



KEMENTERIAN KEWANGAN
MALAYSIA

LAPORAN PASARAN HARTA

Property Market Report

2023



JABATAN PENILAIAN DAN PERKHIDMATAN HARTA
VALUATION AND PROPERTY SERVICES DEPARTMENT
KEMENTERIAN KEWANGAN MALAYSIA
MINISTRY OF FINANCE MALAYSIA

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Jabatan Penilaian dan Perkhidmatan Harta
Kementerian Kewangan Malaysia
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GLOSARI
GLOSSARY

% Pecahan	:	<i>% Breakdown</i>
% Perubahan	:	<i>% Change</i>
"Purata" Semua Rumah	:	<i>"Average" All Houses</i>
Ambilan Ruang	:	<i>Take-up Space</i>
Bandar	:	<i>Town</i>
Berkembar	:	<i>Semi-Detached</i>
Bilangan	:	<i>Number</i>
Bilangan Transaksi	:	<i>Number Of Transactions</i>
Bilangan Unit	:	<i>Number Of Units</i>
Blok Pejabat/Lot Pejabat	:	<i>Office Block/Office Lot</i>
Durian	:	<i>Durian</i>
Dusun	:	<i>Orchard</i>
Fasa	:	<i>Phase</i>
Getah	:	<i>Rubber</i>
Harga Purata	:	<i>Average Price</i>
Hektar	:	<i>Hectare</i>
Indeks Harga Semua Rumah	:	<i>All House Price Index</i>
Indeks Keyakinan Perniagaan	:	<i>Business Condition Index</i>
Industri	:	<i>Industrial</i>
Jenis	:	<i>Type</i>
Juta	:	<i>Million</i>
Kadar Ambilan	:	<i>Take-Up Rate</i>
Kadar Asas Pinjaman (BLR)	:	<i>Base Lending Rate (BLR)</i>
Kadar Dasar Semalaman (OPR)	:	<i>Overnight Policy Rate (OPR)</i>
Kadar Penghunian Purata (pejabat/kompleks perniagaan)	:	<i>Average Occupancy Rate (office/shopping complex)</i>
Kadar Penginapan Purata (hotel)	:	<i>Average Occupancy Rate (hotel)</i>
Kadar Pinjaman Purata (ALR)	:	<i>Average Lending Rate (ALR)</i>
Kadar Pulangan Kasar Purata	:	<i>Average Gross Yield</i>
Kadar Serapan	:	<i>Absorption Rate</i>
Kawasan Sekunder Pusat Bandar	:	<i>Central Town Secondary Area</i>
Kawasan Sekunder Pinggir Bandar	:	<i>Suburban Secondary Area</i>
Kawasan Utama Pusat Bandar	:	<i>Central Town Prime Area</i>
Kawasan Utama Pinggir Bandar	:	<i>Suburban Prime Area</i>
Kedai	:	<i>Shop</i>
Kedai Industri	:	<i>Industrial Shop</i>
Kedai Sebelum Perang	:	<i>Pre-war Shop</i>
Kedai Tanpa Inap	:	<i>Lock-up Shop</i>
Kediaman	:	<i>Residential</i>
Kedudukan/lokasi	:	<i>Location</i>
Kelapa	:	<i>Coconut</i>
Kelapa Sawit	:	<i>Oil Palm</i>
Keluaran Dalam Negara Kasar (KDNK)	:	<i>Gross Domestic Product (GDP)</i>
Kilang Berkembar/Gudang	:	<i>Semi-Detached Factory/Warehouse</i>

GLOSARI
GLOSSARY

Kilang Sesebuah/Gudang	:	<i>Detached Factory/Warehouse</i>
Kilang Teres/Gudang	:	<i>Terraced Factory/Warehouse</i>
Koko	:	<i>Cocoa</i>
Kompleks	:	<i>Complex</i>
Kompleks Industri/Unit	:	<i>Industrial Complex/Unit</i>
Kompleks Perniagaan	:	<i>Shopping Complex</i>
Kondominium	:	<i>Condominium</i>
Kopi	:	<i>Coffee</i>
Ladang	:	<i>Estate</i>
Lingkungan Harga	:	<i>Price Range</i>
Lingkungan Sewa Sebulan	:	<i>Rental Range Per Month</i>
Lot Niaga Di Dalam Kompleks Perniagaan	:	<i>Retail Lot In Shopping Complex</i>
Luas Lantai Purata	:	<i>Average Floor Area</i>
Luas Tanah Purata	:	<i>Average Land Area</i>
m.p. (Meter Persegi)	:	<i>s.m. (Square Meter)</i>
Nilai	:	<i>Value</i>
Nilai Pindah Milik	:	<i>Value of Transactions</i>
Padi	:	<i>Paddy</i>
Padi Dua Kali Setahun	:	<i>Double Cropping Paddy</i>
Padi Sekali Setahun	:	<i>Single Cropping Paddy</i>
Pajakan	:	<i>Lease</i>
Pangsapuri	:	<i>Apartment</i>
Paras Ambang	:	<i>Threshold Level</i>
Pasaran Sewa	:	<i>Rental Market</i>
Pecahan Lot	:	<i>Subdivision of Lot</i>
Pedalaman	:	<i>Interior</i>
Penawaran Akan Datang	:	<i>Incoming Supply</i>
Penawaran Baru Dirancang	:	<i>New Planned Supply</i>
Penawaran Dalam Perancangan	:	<i>Planned Supply</i>
Penghunian (pejabat/kompleks perniagaan)	:	<i>Occupancy (office/shopping complex)</i>
Penginapan (hotel)	:	<i>Occupancy (hotel)</i>
Perniagaan/Perdagangan/Komersial	:	<i>Commercial</i>
Pertanian	:	<i>Agricultural</i>
Perubahan % Dari Tahun Ke Tahun	:	<i>Year on Year % Change</i>
Perubahan Harga Purata	:	<i>Average Price Change</i>
Perubahan Sewaan Purata	:	<i>Average Rental Change</i>
Plot Kosong	:	<i>Vacant Plot</i>
Plot Perniagaan	:	<i>Commercial Plot</i>
Prestasi Jualan	:	<i>Sales Performance</i>
Rumah Bandar	:	<i>Townhouse</i>
Rumah Berkelompok/Kluster	:	<i>Cluster House</i>
Rumah Kos Rendah	:	<i>Low-Cost House</i>
Rumah Pangsa	:	<i>Flat</i>
Rumah Pangsa Kos Rendah	:	<i>Low-Cost Flat</i>

GLOSARI GLOSSARY

Saiz Sampel	:	<i>Sample Size</i>
Sayur-sayuran	:	<i>Vegetable</i>
Sesebuah	:	<i>Detached</i>
Sewa	:	<i>Rent</i>
Sewaan	:	<i>Rental</i>
Sewaan Tingkat Bawah Kedai	:	<i>Rentals of Ground Floor Shop</i>
Skim Perumahan Bertingkat Tinggi	:	<i>High-Rise Residential Schemes</i>
Skim Perumahan Konvensional	:	<i>Conventional Housing Schemes</i>
Stabil	:	<i>Stable</i>
Stok Sedia Ada	:	<i>Existing Stock</i>
Tahun Siap (dibina)	:	<i>Year of Completion</i>
Taman Perindustrian Ringan	:	<i>Light Industrial Park</i>
Tanah Adat Melayu	:	<i>Malay Customary Land</i>
Tanah Kampung	:	<i>Kampung Land</i>
Tanah Kosong	:	<i>Vacant Land</i>
Tanah Pembangunan	:	<i>Development Land</i>
Tanah Rezab Melayu	:	<i>Malay Reservation Land</i>
Tarif	:	<i>Tariff</i>
Tembakau	:	<i>Tobacco</i>
Tempoh Kajian	:	<i>Review Period</i>
Tempoh Sebelumnya/Sebelum ini	:	<i>Preceding Period</i>
Tempoh Yang Sama Tahun Lalu	:	<i>Corresponding Period</i>
Teres	:	<i>Terraced</i>
Berkelompok/Kluster	:	<i>Cluster</i>
Tidak Didefinisikan (ND)	:	<i>Not Definable (ND)</i>
Tidak Boleh Dipindah Milik	:	<i>Not Transferable</i>
Tidak Diperolehi (NA)	:	<i>NA (Not Available)</i>
Tingkat Bawah	:	<i>Ground Floor</i>
Tingkat Bawah Tanah	:	<i>Lower Ground Floor</i>
Trend / Aliran	:	<i>Trend</i>
Trend / Aliran Menaik	:	<i>Upward Trend</i>
Trend / Aliran Menurun	:	<i>Downward Trend</i>
Belum Dibina Belum Terjual	:	<i>Unsold Not Constructed</i>
Dalam Pembinaan Belum Terjual	:	<i>Unsold Under Construction</i>
Mula Dibina	:	<i>Starts</i>
Siap Dibina	:	<i>Completion</i>
Siap Dibina Tidak Terjual	:	<i>Overhang</i>

GAMBARAN KESELURUHAN
OVERVIEW

1.0 GAMBARAN KESELURUHAN PASARAN HARTA TANAH

Ekonomi Malaysia berkembang sederhana 3.0% pada Q4 2023 (Q3 2023: 3.3%; Q2 2023: 2.9%), disokong oleh pengembangan dalam permintaan domestik, keadaan pasaran buruh yang bertambah baik dan pertumbuhan dalam aktiviti pelaburan, komoditi dan sektor perkhidmatan. Secara keseluruhan, pertumbuhan 2023 ekonomi Malaysia kembali normal kepada 3.7%, selepas pertumbuhan kukuh dicatatkan pada tahun sebelumnya (2022: 8.7%).

Walaupun persekitaran kewangan dan ekonomi global yang mencabar, pasaran harta tanah kekal berdaya tahan pada 2023 disokong oleh prestasi yang positif di semua nilai subsektor keculia subsektor pertanian berbanding tahun sebelumnya. Pada 2023, jumlah bilangan dan nilai transaksi masing-masing meningkat 2.5% dan 9.9% kepada 399,008 transaksi bernilai RM196.83 bilion (2022: 389,107 transaksi; RM179.07 bilion; 2021: 300,497 transaksi; RM144.87 bilion). Subsektor kediaman terus menyumbang bahagian terbesar transaksi, mencatatkan peningkatan marginal dalam bilangan dan nilai.

Subsektor industri merekodkan pertumbuhan sederhana pada tahun 2023, kekal positif sejak Q3 2023 (meningkat 10.7%), selepas mengalami pertumbuhan negatif dalam separuh pertama 2023 (menurun 2.5%). Pertumbuhan sederhana ini sejajar dengan Jabatan Perangkaan Malaysia (DOSM) dalam Indeks Pengeluaran Perindustrian (IPI) Malaysia bagi tahun 2023, yang mencatatkan pertumbuhan marginal 0.9% pada 2023 berbanding 6.7% pada tahun 2022. Semua sektor mencatat pertumbuhan positif iaitu elektrik (2.5%); perlombongan (0.8%) dan pembuatan (0.7%).

Table 1

Percentage Change from Corresponding Quarter of Preceding Year

Year	2022	Q1 22	Q2 22	Q3 22	Q4 22	2023	Q1 23	Q2 23	Q3 23	Q4 23
GDP (% yoy)	8.7%	5.0%	8.9%	14.2%	7.0%	3.7%	5.6%	2.9%	3.3%	3.0%

Source: Department of Statistics Malaysia/ Bank Negara Malaysia

Pelaburan Langsung Asing (FDI) di Malaysia merekodkan aliran masuk bersih lebih tinggi sebanyak RM926.30 bilion pada S4 2023 berbanding S3 2023 (RM914.90 bilion). Pelaburan ini disalurkan terutamanya ke sektor perkhidmatan dengan nilai RM468.40 bilion (50.6%), diikuti oleh pembuatan (RM390.80 bilion; 42.2%) dan perlombongan dan kuari (RM42.1 bilion; 4.5%). Tiga negara teratas bagi kedudukan FDI ialah Singapura (RM207.70 bilion; 22.4%), dan Hong Kong (RM113.30 bilion; 12.2%) dan Amerika Syarikat (RM97.40 bilion; 10.5%). Justeru itu, kelonggaran program Malaysia My

1.0 OVERVIEW OF THE PROPERTY MARKET

The Malaysian economy expanded by 3.0% in Q4 2023 (Q3 2023: 3.3%; Q2 2023: 2.9%), supported by expansion in domestic demand, improving labour market conditions, growth in investment activity, commodities and services sectors. Overall, the 2023 growth for the Malaysian economy normalised to 3.7%, after a strong growth registered in the previous year (2022: 8.7%).

Despite a challenging global financial and economic environment, the property market stayed resilient in 2023 supported by positive performance in all sub-sectors except agriculture compared to the previous year. In 2023, total transactions volume and value increased by 2.5% and 9.9% respectively to 399,008 transactions worth RM196.83 billion (2022: 389,107 transactions; RM179.07 billion; 2021: 300,497 transactions; RM144.87 billion). The residential sub-sector continued to contribute the largest share of transactions, recorded a marginal increase in both volume and value.

The industrial sub-sector recorded moderate growth in 2023, remained positive since Q3 2023 (increased by 10.7%), after experienced negative growth in first half 2023 (declined by 2.5%). It is in tandem to Department of Statistics Malaysia (DOSM), Malaysia's Industrial Production Index (IPI) for the year of 2023, which registered a marginal growth of 0.9% in 2023 as compared to 6.7% in 2022. All sectors posted positive growth namely electricity (2.5%); mining (0.8%) and manufacturing (0.7%).

Foreign Direct Investment (FDI) in Malaysia recorded a higher net inflow of RM926.30 billion in Q4 2023 as compared to Q3 2023 (RM914.90 billion). These investments were channelled mainly into the services sector with a value of RM468.40 billion (50.6%), followed by manufacturing (RM390.80 billion; 42.2%) and mining and quarrying (RM42.1 billion; 4.5%). The top three countries for FDI position were Singapore (RM207.70 billion; 22.4%), and Hong Kong (RM113.30 billion; 12.2%) and the United States of America (RM97.40 billion; 10.5%). Thus, the relaxation of Malaysia My

Second Home (MM2H) yang diumumkan oleh Kerajaan pada Disember 2023 adalah di landasan yang betul untuk meningkatkan pelaburan asing di Malaysia khususnya dalam sektor harta tanah.

Menurut Institut Penyelidikan Ekonomi Malaysia (MIER), Indeks Sentimen Pengguna (CSI) bertambah baik secara berhati-hati pada S4 2023, meningkat kepada 89.4 mata (S3 2023: 78.9 mata), CSI masih kekal positif berikutan jangkaan kewangan dan pekerjaan bertambah baik, dan jangkaan inflasi dalam kalangan pengguna kekal berhati-hati serta perancangan perbelanjaan pengguna melantun semula. Sejalan dengan itu, Indeks Keadaan Perniagaan (BSI) menunjukkan trend aliran yang sama, apabila indeks meningkat kepada 89.0 mata (S3 2023: 79.7 mata). Keyakinan perniagaan telah meningkat pada S4 2023, terutamanya disebabkan oleh peningkatan dalam pelaburan modal dan Indeks Jangkaan (EI) telah bertambah baik. Sebaliknya, jualan bagi pesanan domestik dan luaran adalah berkurangan. Kedua-dua CSI dan BSI, pada catatan yang sama, menghampiri ambang optimisme 100 mata.

Pertumbuhan pasaran harta tanah pada 2023 disokong oleh pelaksanaan pelbagai inisiatif dan bantuan kerajaan serta keadaan pasaran buruh yang bertambah baik. Pelbagai inisiatif yang digariskan di bawah Bajet 2023 oleh kerajaan telah membantu merangsang aktiviti pasaran harta tanah. Inisiatif tersebut adalah:

1. Pengecualian penuh duti setem ke atas surat cara pindah milik dan perjanjian pinjaman untuk pembelian rumah kediaman pertama berharga sehingga RM500,000 oleh warganegara Malaysia kekal sehingga 31 Disember 2025.
2. Kenaikan pelepasan duti setem daripada 50% kepada 75% untuk pembelian hartanah kediaman pertama berharga antara RM500,000 hingga RM 1 juta oleh warganegara Malaysia dan hanya terpakai untuk perjanjian jual beli yang disempurnakan sehingga 31 Disember 2023.
3. Pengecualian penuh duti setem sehingga RM1 juta dan 50% pelepasan duti setem bagi amaun selebihnya bagi pindah milik harta secara kasih sayang antara ahli keluarga (bapa kepada anak dan datuk kepada cucu).
4. Peruntukan RM460.2 juta untuk pembinaan rumah baharu dan ubah suai rumah di kawasan luar bandar.
5. Peruntukan RM389.5 juta akan disalurkan kepada Program Perumahan Rakyat.
6. Peruntukan RM358 juta untuk pembinaan rumah mampu milik di bawah program Rumah Mesra Rakyat oleh Syarikat Perumahan Negara Berhad.
7. Peruntukan RM462 juta untuk pembinaan 23,000 rumah di bawah Projek Perumahan Awam Malaysia.
8. Meningkatkan jaminan sehingga RM5 bilion melalui Syarikat Jaminan Kredit Perumahan (SJKP) dalam membantu pekerja gig seperti pekerja e-hailing dalam mendapatkan pembiayaan rumah sehingga RM500,000.

Second Home (MM2H) program which was announced by the Government in December 2023 is on the right track to boost foreign investment in Malaysia particularly in real estate sector.

According to Malaysia Institute of Economic Research (MIER), the Consumer Sentiments Index (CSI) improved cautiously in Q4 2023, increased to 89.4 points (Q3 2023: 78.9 points), CSI still maintain in positive manner due to expected finances and employment improved, and expected inflation among consumers remains cautious and planned consumer spending bounce back. Correspondingly, Business Conditions Index (BSI) indicate similar trend, as the index increased to 89.0 points (Q3 2023: 79.7 points). The business confidence has increased in Q4 2023, mainly due to a rise in capital investment and Expected Index (EI) has improved. Contrarily, sales with both domestic and external orders reduced. Both CSI and BSI, on the same note, approaching the optimism 100 points threshold.

The growth in 2023 property market is highly supported by the implementation of various government initiatives and assistance and improving labour market conditions. Several initiatives which outlined under Budget 2023 by the government to a certain extent helped improve property market activities. These are:

1. *Full stamp duty exemption on instrument of transfer and loan agreement for the purchase of the first residential home priced up to RM500,000 by Malaysia citizens remained until 31 December 2025.*
2. *Increase of stamp duty remission from 50% to 75% for the purchase of the first residential properties priced between RM500,000 to RM 1 million by Malaysian citizens and applicable for sale and purchase agreements executed until 31 December 2023.*
3. *Full stamp duty exemption up to RM1 million and 50% stamp duty remission for the remaining balance on transfers of property by way of love and affection between family members (father to child and grandfather to grandson).*
4. *Allocation of RM460.2 million for the building of new homes and home renovations in rural areas.*
5. *Allocation of RM389.5 million will be channelled to the People's Housing Programme.*
6. *Allocation of RM358 million for the construction of affordable homes under Rumah Mesra Rakyat programme by Syarikat Perumahan Negara Berhad.*
7. *Allocation of RM462 million for the construction of 23,000 houses under Projek Perumahan Awam Malaysia.*
8. *Increase the guarantees of up to RM5 billion via Syarikat Jaminan Kredit Perumahan (SJKP) in assisting gig workers such as e-hailing workers in obtaining home financing up to RM500,000.*

Kadar Dasar Semalaman (OPR) tidak berubah iaitu pada kadar 3.0% sejak Mei 2023, selepas peningkatan sebanyak 0.25 mata asas daripada 2.75% peningkatan kali terakhir pada November 2022. Pendirian dasar monetari kekal menyokong ekonomi dan ianya konsisten dengan penilaian semasa bagi inflasi dan prospek pertumbuhan, berwaspada terhadap perkembangan yang sedang berlaku untuk memaklumkan penilaian terhadap prospek inflasi dan pertumbuhan dalam negeri serta kondusif kepada pertumbuhan ekonomi yang mampan di tengah-tengah kestabilan harga. Paras semasa kadar pinjaman dilihat menuju ke kadar pra-pandemik iaitu pada 3.00% pada 2019, pengumuman terkini adalah pada 24 Januari 2024.

Overnight Policy Rate (OPR) was stagnant at 3.0% since May 2023, after an increase by 0.25 basis points from 2.75%, last increased in November 2022. The monetary policy stance remains supportive of the economy and is consistent with the current assessment of the inflation and growth prospects, vigilant to ongoing developments to inform the assessment on the outlook of domestic inflation and growth as well as conducive to sustainable economic growth amid price stability. The current level of borrowing rate is seen heading to pre-pandemic rate at 3.00% in 2019, which the latest announced was in 24 January 2024.

Table 2
OPR Decision

Date	Change in OPR (%)	New OPR Level (%)
24-Jan-24	0	3.00
2-Nov-23	0	3.00
7-Sep-23	0	3.00
6-Jul-23	0	3.00
3-May-23	+0.25	3.00
9-Mar-23	0	2.75
19-Jan-23	0	2.75
3-Nov-22	+0.25	2.75
8-Sep-22	+0.25	2.50
6-Jul-22	+0.25	2.25
11-May-22	+0.25	2.00
3-Mar-22	0	1.75
20-Jan-22	0	1.75

Source: Bank Negara Malaysia

Dari segi permintaan, pergerakan bercampur ditunjukkan dalam petunjuk permintaan harta tanah kediaman dan bukan kediaman. Permohonan pinjaman untuk pembelian kediaman menunjukkan sedikit penurunan 0.7% berbanding 2022 (28.7%) manakala kelulusan pinjaman meningkat 3.1%. Namun begitu, keadaan berbeza bagi harta bukan kediaman di mana permohonan dan kelulusan pinjaman berjaya mencatatkan peningkatan masing-masing sebanyak 29.6% dan 14.8%.

On the demand side, mixed movements are shown in the indicators of residential and non-residential property demand. The loan applications for residential purchase indicate a slight decline of 0.7% as compared to 2022 (28.7%) whilst loan approvals increased marginally by 3.1%. Nevertheless, the situation differs for non-residential property where loan applications and approval managed to register an increase of 29.6% and 14.8% respectively.

Table 3

Loan Application and Loan Approval for Purchase of Residential

Purchase of Residential					
Year	Loan Application (RM Billion)	Loan Approval (RM Billion)	% Change Loan Application	% Change Loan Approval	Ratio Approval/ Application (%)
2017	239.81	101.52	13.1	15.9	42.3
2018	240.90	103.70	0.4	2.1	43.1
2019	260.77	112.57	8.3	8.6	43.2
2020	266.44	93.12	2.2	-17.3	35.0
2021	349.60	122.00	31.2	31.0	34.9
2022	450.07	181.37	28.7	48.7	40.3
2023	446.74	186.94	-0.7	3.1	41.8

Source: Bank Negara Malaysia

Table 4

Loan Application and Loan Approval for Purchase of Non-Residential

Purchase of Residential					
Year	Loan Application (RM Billion)	Loan Approval (RM Billion)	% Change Loan Application	% Change Loan Approval	Ratio Approval/ Application (%)
2017	86.04	31.12	7.6	-5.4	36.2
2018	96.93	35.15	12.7	12.9	36.3
2019	97.57	36.55	0.7	4.0	37.5
2020	68.34	22.96	-30.0	-37.2	33.6
2021	91.49	33.45	33.9	45.7	36.6
2022	122.38	64.49	33.8	92.8	52.7
2023	158.61	74.05	29.6	14.8	46.7

Source: Bank Negara Malaysia

2.0 AKTIVITI PASARAN HARTA TANAH

Pasaran harta tanah meningkat secara beransur-ansur pada tahun 2023, lebih tinggi selepas mengalami penurunan pada tahun 2020 akibat pandemik Covid-19. Sebanyak 399,008 transaksi bernilai RM196.83 bilion direkodkan, masing-masing menunjukkan peningkatan 2.5% dan 9.9% berbanding 2022, yang merekodkan 389,107 transaksi bernilai RM179.07 bilion. Daripada jumlah transaksi, 77.7% (309,861 transaksi) dan 18.6% (74,405 transaksi) masing-masing merupakan transaksi bertarikh 2023 dan 2022 manakala baki peratusan lagi merupakan transaksi tahun sebelumnya.

Prestasi aktiviti pasaran mengikut sektor menunjukkan pergerakan menaik. Subsektor kediaman, komersial, perindustrian dan pembangunan mencatatkan pertumbuhan tahun ke tahun masing-masing 3.0%, 23.3%, 0.9% dan 5.0%, manakala subsektor pertanian mencatatkan sebaliknya, merosot 7.8% dalam bilangan.

Nilai transaksi merekodkan peningkatan lebih tinggi bagi semua subsektor iaitu kediaman, komersial, perindustrian, pertanian dan tanah pembangunan dan lain-lain, masing-masing pada 7.1%, 17.5%, 13.1%, 4.6% dan 13.8%.

Subsektor kediaman menerajui keseluruhan pasaran harta tanah, dengan menyumbang 62.8% dalam bilangan. Ini diikuti oleh subsektor pertanian (19.0%), komersial (10.1%), tanah pembangunan dan lain-lain (6.1%) dan industri (2.0%). Begitu juga nilai, subsektor kediaman mendahului dengan 51.3% bahagian, diikuti oleh komersial (19.5%), perindustrian (12.2%), pertanian (9.5%) dan tanah pembangunan dan lain-lain (7.5%).

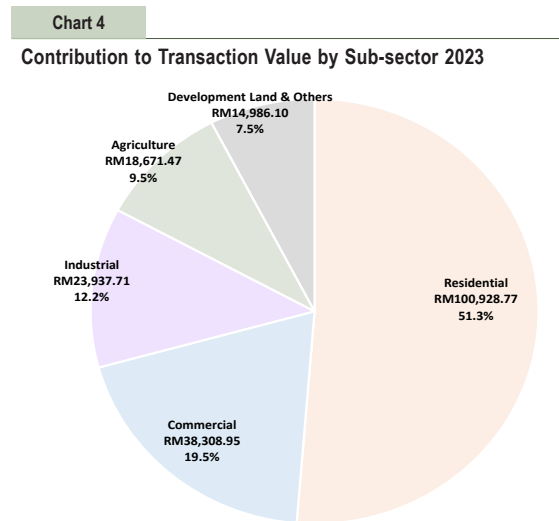
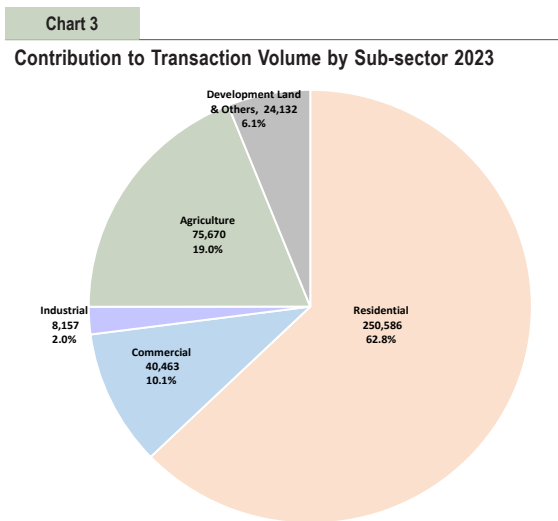
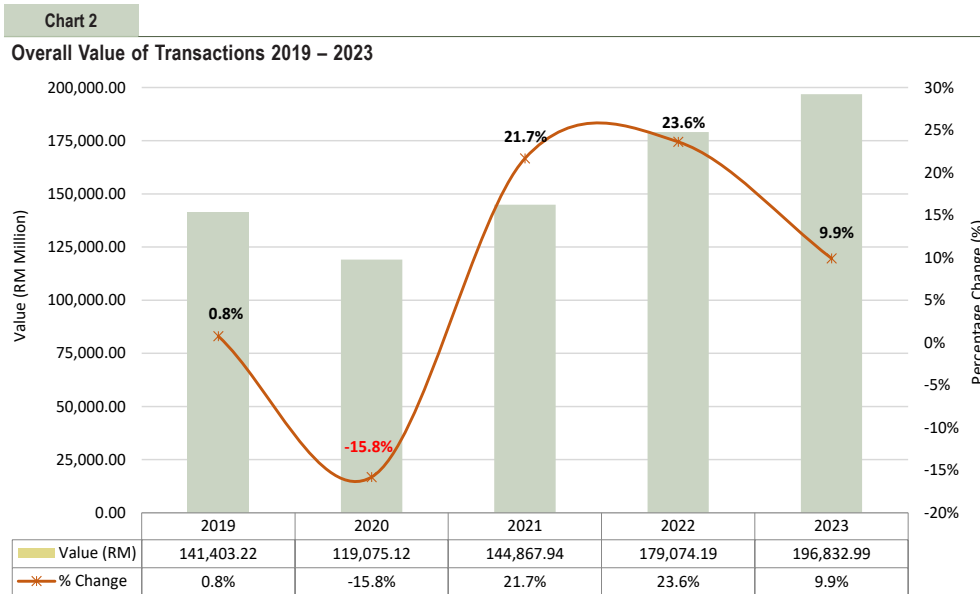
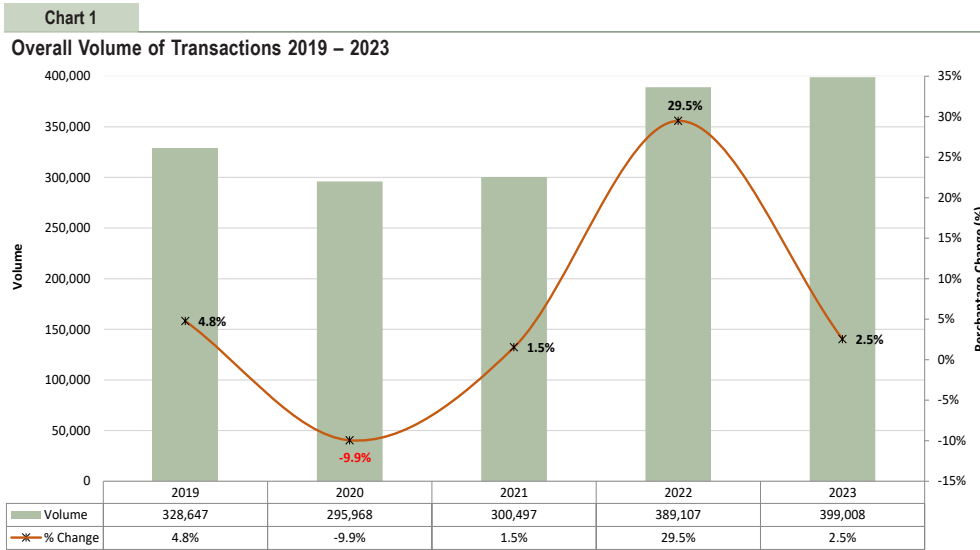
2.0 PROPERTY MARKET ACTIVITY

The property market has gradually increased in 2023, higher after the downturn in 2020 due to Covid-19 pandemic. A total of 399,008 transactions worth RM196.83 billion were recorded, each showing an increase of 2.5% and 9.9% respectively compared to 2022, which recorded 389,107 transactions worth RM179.07 billion. Of the total transactions, 77.7% (309,861 transactions) and 18.6% (74,405 transactions) were transfers dated in 2023 and 2022 respectively while the remaining percentage share was for prior years' transfers.

Sectoral market activity performance showed upward movements. Residential, commercial, industrial and development land sub-sectors recorded year-on-year growths of 3.0%, 23.3%, 0.9% and 5.0% respectively, whereas agricultural sub-sector recorded otherwise, declined by 7.8% in volume.

Value of transactions recorded higher increase for all sub-sectors i.e. residential, commercial, industrial, agriculture and development land and others, each at 7.1%, 17.5%, 13.1%, 4.6% and 13.8% respectively.

Residential sub-sector led the overall property market, with 62.8% contribution in volume. This was followed by agriculture (19.0%), commercial (10.1%), development land and others (6.1%) and industrial (2.0%). Similarly in value, residential took the lead with 51.3% share, followed by commercial (19.5%), industrial (12.2%), agriculture (9.5%) and development land and others (7.5%).



2.1 Harta Tanah Kediaman

Transaksi

Terdapat 250,586 transaksi bernilai RM100.93 bilion didirekodkan pada tahun 2023, peningkatan marginal 3.0% dalam bilangan dan 7.1% dalam nilai berbanding 2022. Peningkatan itu disokong oleh trend menaik yang direkodkan di Johor (44.4%), WP Kuala Lumpur dan Pulau Pinang (4.3%), Terengganu (2.0%), Negeri Sembilan (1.9%) dan Kedah (1.6%). Apabila digabungkan, negeri-negeri ini membentuk kira-kira 48.0% daripada keseluruhan bilangan kediaman negara.

Selangor menyumbang bilangan dan nilai tertinggi kepada syer pasaran negara, dengan 22.0% dalam bilangan (55,035 transaksi) dan 30.0% dalam nilai (RM30.26 bilion). Johor dikedudukan kedua tertinggi dengan 16.2% dalam bilangan (40,561 transaksi) dan 18.0% dalam nilai (RM18.12 bilion). Mengikut jenis, permintaan terus tertumpu kepada rumah teres, membentuk sekitar 43.6% daripada jumlah transaksi kediaman, diikuti oleh unit bertingkat tinggi (14.7%), tanah kosong (14.2%) dan rumah /flat kos rendah (10.7%).

Permintaan terus tertumpu kepada rumah mampu milik. Julat harga mampu milik RM300,000 dan ke bawah menyumbang 52.8% daripada jumlah keseluruhan transaksi kediaman, diikuti julat harga RM300,001 hingga RM500,000 (24.9%), RM500,001 hingga RM1 juta (17.2%) dan julat harga melebihi RM1 juta (5.1%). Daripada jumlah transaksi harta tanah kediaman, 21.5% adalah transaksi pasaran utama (pembelian daripada pemaju) manakala bakinya 78.5% adalah transaksi pasaran sekunder (sub-jualan).

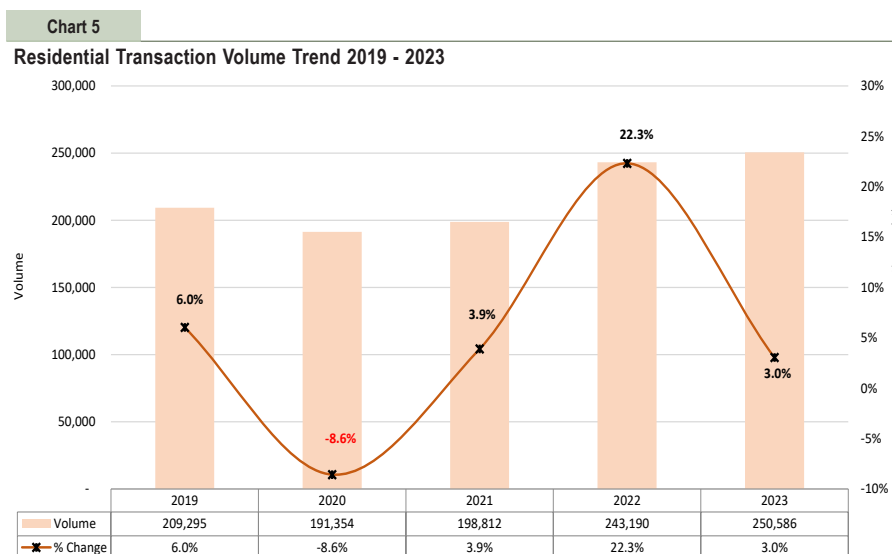
2.1 Residential Property

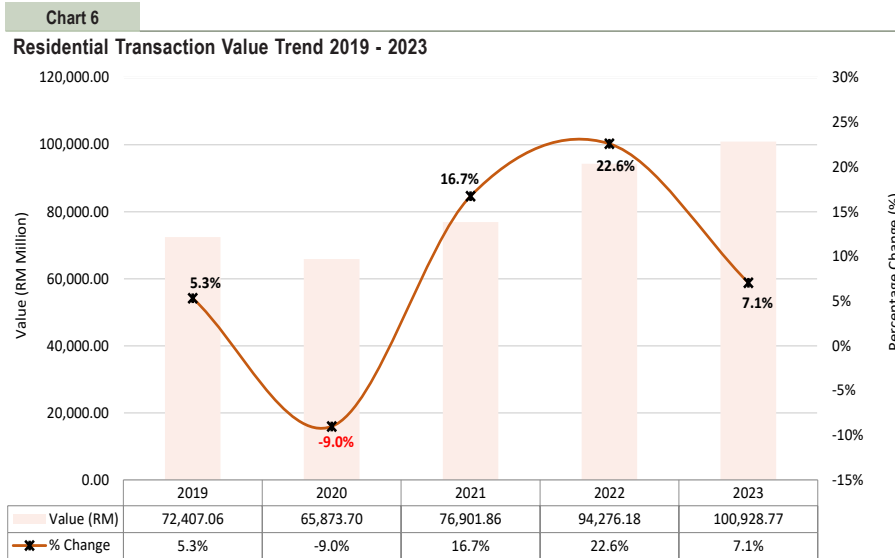
Transaction

There were 250,586 transactions worth RM100.93 billion recorded in 2023, a marginal increase of 3.0% in volume and 7.1% in value as compared to 2022. The improvement was supported by the uptrend recorded in Johor (44.4%), WP Kuala Lumpur and Pulau Pinang (4.3%), Terengganu (2.0%), Negeri Sembilan (1.9%) and Kedah (1.6%). Combined, these states formed about 48.0% of the total national residential volume.

Selangor contributed the highest volume and value to the national market share, with 22.0% in volume (55,035 transactions) and 30.0% in value (RM30.26 billion). Johor ranked second highest market share with 16.2% in volume (40,561 transactions) and 18.0% in value (RM18.12 billion). By type, demand continued to focus on terraced houses, formed around 43.6% of the total residential transactions, followed by high-rise units (14.7%), vacant plots (14.2%) and low-cost houses/flats (10.7%).

Demand continued to focus on affordable houses. The affordable price range of RM300,000 and below accounted for 52.8% of the total residential transactions, followed by RM300,001 to RM500,000 (24.9%), RM500,001 to RM1 million (17.2%) and more than RM1 million (5.1%). Of the total residential property transactions, 21.5% was primary market transactions (purchase from developers) while the remaining 78.5% was secondary market transactions (sub-sales).





Pelancaran Baharu

Prestasi pasaran utama lebih memberangsangkan pada tahun 2023. Sebanyak 56,526 unit pelancaran telah direkodkan, berbanding 54,118 unit pada tahun 2022. Peningkatan sedikit ini disokong oleh trend menaik yang direkodkan di Johor, Sarawak dan Perlis yang meningkat lebih 50%. Ia mungkin dikaitkan dengan pelbagai insentif dan bantuan yang diberikan oleh kerajaan untuk mempromosikan pemilikan rumah dalam Bajet 2023 terutamanya bagi pembeli rumah kali pertama. Prestasi jualan menunjukkan angka yang lebih baik 40.4%, lebih tinggi daripada 36.0% pada tahun 2022.

Johor merekodkan jumlah pelancaran baharu tertinggi dalam negara, menguasai 21.9% (12,390 unit) daripada jumlah nasional dengan prestasi jualan 42.9%. Selangor mencatatkan jumlah kedua tertinggi (11,542 unit, 20.4% syer) dan WP Kuala Lumpur dikedudukan ketiga (5,927 unit, 10.5% syer). Selangor dan WP Kuala Lumpur masing-masing mencatatkan prestasi jualan 55.0% dan 28.7%.

Rumah teres mendominasi pelancaran baharu, di mana teres satu tingkat (10,842 unit) dan teres dua hingga tiga tingkat (16,959 unit) sama-sama menyumbang 49.2% daripada jumlah keseluruhan unit. Unit kondominium/pangsapuri dikedudukan kedua menguasai 33.6% (18,964 unit) daripada jumlah keseluruhan unit, kebanyakannya di WP Kuala Lumpur dan Selangor.

New Launches

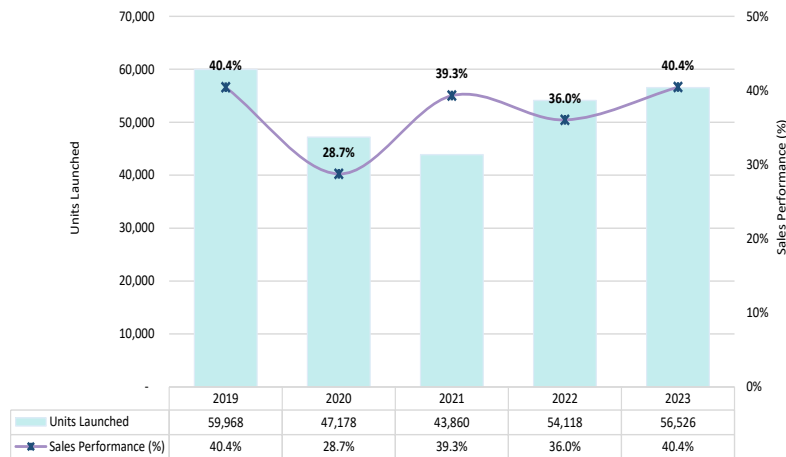
The primary market performance more encouraging in 2023. A total of 56,526 units launched were recorded, against 54,118 units in 2022. The slight improvement was supported by the uptrend recorded in Johor, Sarawak and Perlis which increased more than 50%. It could be attributed to the various incentives and assistance given by the government to promote home ownership especially the first-time purchaser in Budget 2023. Sales performance shows better figure at 40.4%, higher than 36.0% in 2022.

Johor recorded the highest number of new launches in the country, capturing 21.9% (12,390 units) of the national total with sales performance of 42.9%. Selangor recorded the second highest number (11,542 units, 20.4% share) and WP Kuala Lumpur came third (5,927 units, 10.5% share). Both Selangor and WP Kuala Lumpur recorded 55.0% and 28.7% sales performance respectively.

Terraced houses dominated the new launches, whereby single storey terrace (10,842 units) and two to three storey (16,959 units), jointly contributed 49.2% of the total units. Condominium/apartment units came second, capturing 33.6% (18,964 units) of the total units, mostly in WP Kuala Lumpur and Selangor.

Chart 7

New Launches and Sales Performance 2019 - 2023



Status Pasaran

Keadaan kediaman siap dibina tidak terjual bertambah baik apabila bilangannya terus berkurangan berbanding tahun sebelumnya. Terdapat 25,816 unit siap dibina tidak terjual bernilai RM17.68 bilion direkodkan pada S4 2023, masing-masing berkurangan 7.0% dan 4.0% dalam bilangan dan nilai berbanding S4 2022 (27,746 unit siap dibina tidak terjual bernilai RM18.41 bilion).

Market Status

The residential overhang situation improved as the numbers continued to reduce as compared to previous year. There were 25,816 overhang units worth RM17.68 billion recorded in Q4 2023, reduced by 7.0% and 4.0% in volume and value respectively against Q4 2022 (27,746 overhang units worth RM18.41 billion).

Perak mencatatkan bilangan unit siap dibina tidak terjual tertinggi dalam negara dengan 4,598 unit, merangkumi 17.8% daripada jumlah keseluruhan negara. Bilangan unit ini diikuti Johor (4,228 unit), WP Kuala Lumpur (3,535 unit), Selangor (3,405 unit) dan Pulau Pinang (3,001 unit). Daripada aspek nilai, WP Kuala Lumpur dan Selangor mencatatkan nilai tertinggi dengan RM3.63 bilion bagi setiap negeri, diikuti Johor (RM3.40 bilion) dan Pulau Pinang (RM2.61 bilion).

Perak recorded the highest number of overhang units in the country with 4,598 units, accounting to 17.8% of the national total. Followed by Johor (4,228 units), WP Kuala Lumpur (3,535 units), Selangor (3,405 units) and Pulau Pinang (3,001 units). In terms of value, WP Kuala Lumpur and Selangor recorded the highest value with RM3.63 billion for each state, followed by Johor (RM3.40 billion) and Pulau Pinang (RM2.61 billion).

Kondominium/ pangsapuri membentuk 60.5% (15,606 unit) daripada jumlah keseluruhan siap dibina tidak terjual negara, diikuti rumah teres (24.3%; 6,279 unit). Unit kondominium/pangsapuri di empat negeri utama, khususnya di Daerah Johor Bahru, Gombak, Timur Laut, Barat Daya, serta di Seksyen 1-100 dan Petaling, WP Kuala Lumpur mendominasi unit siap dibina tidak terjual, menyumbang 27.4% (7,079 unit). Sementara itu, rumah teres di Perak, kebanyakannya di Hilir Perak dan Manjung mendominasi unit rumah teres siap dibina tidak terjual membentuk baki 10.9% (2,806 unit) daripada jumlah keseluruhan negara.

Condominiums/ apartments formed 60.5% (15,606 units) of the national total overhang, followed by terraced houses (24.3%; 6,279 units). Condominium/apartment units in four major states, specifically in Johor Bahru, Gombak, Timur Laut and Barat Daya District, as well as in Mukim Section 1-100 and Petaling, WP Kuala Lumpur dominated the overhang units, accounting for 27.4% (7,079 units). Meanwhile, terraced houses in Perak, mostly in Hilir Perak and Manjung dominated the terraced houses overhang units formed the remaining 10.9% (2,806 units) of the national total.

Mengikut julat harga, rumah dalam julat harga mampu milik di bawah RM300,000 membentuk 29.4% (7,592 unit) daripada jumlah keseluruhan, lebih tinggi daripada 23.5% yang direkodkan pada tahun 2022. Julat harga antara RM500,001 hingga RM1 juta dikedudukan kedua,

By price range, houses in the affordable price range of below RM300,000 formed 29.4% (7,592 units) of the total, higher than 23.5% which recorded in 2022. Price range between RM500,001 and RM1 million came second, accounted for 29.1% (7,523 units). Meanwhile, those

menyumbang 29.1% (7,523 unit). Sementara itu, rumah dalam julat harga RM300,001 hingga RM500,000 membentuk 25.3% lagi (6,528 unit), diikuti julat harga melebihi RM1 juta menyumbang baki sebanyak 16.2% (4,173 unit).

houses in the price range of RM300,001 to RM500,000 formed another 25.3% (6,528 units), followed by more than RM1 million price range contributed the balance 16.2% (4,173 units).

Unit dalam pembinaan belum terjual bertambah baik seiring dengan bilangannya yang terus berkurang kepada 51,132 unit (2022: 57,649 unit), turun 11.3%, manakala belum dibina belum terjual merekodkan penurunan ketara 28.3% dalam bilangan dengan 7,926 unit (2022: 11,053 unit).

The unsold under construction improved in tandem as the numbers further declined to 51,132 units (2022: 57,649 units), dropped by 11.3%, meanwhile unsold not constructed recorded sharply decrease by 28.3% in number with 7,926 units (2022: 11,053 units).

Chart 8

Residential Market Status 2019 - 2023

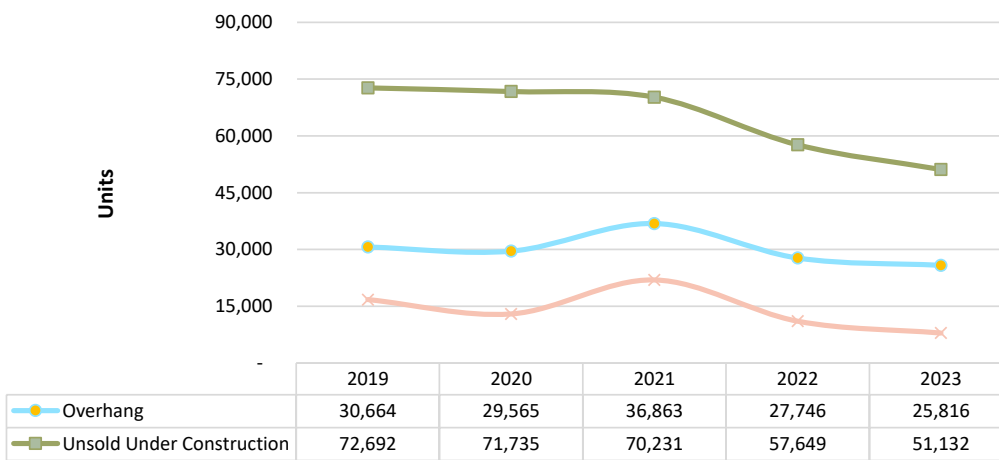
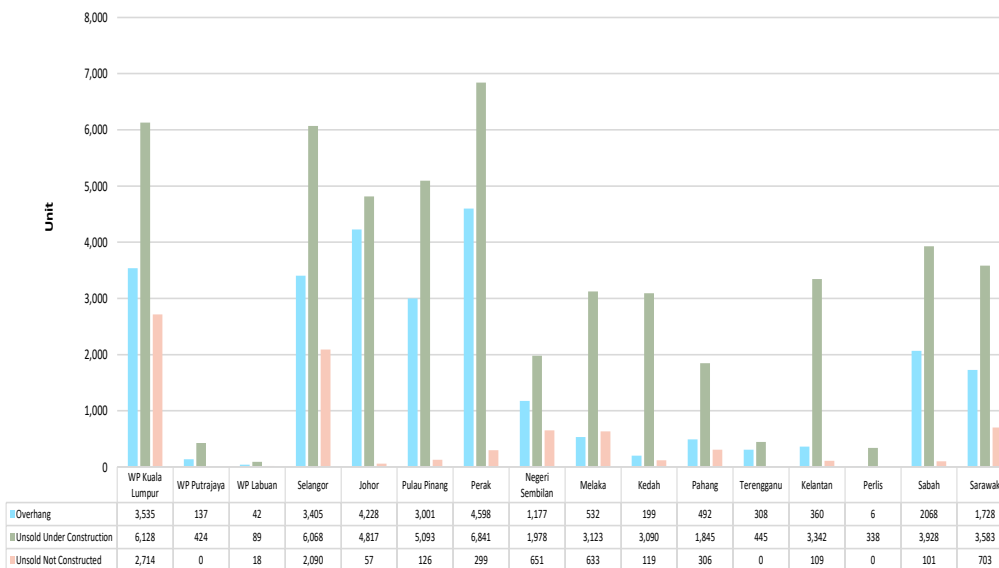


Chart 9

Residential Market Status by State 2023



Aktiviti Pembinaan

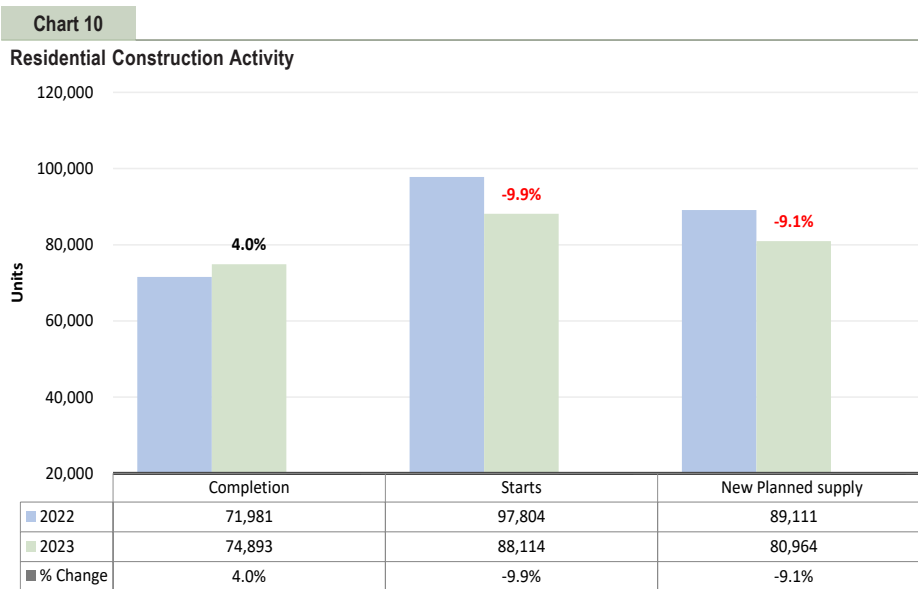
Dalam segmen pembinaan, kediaman siap dibina adalah memberangsangkan, meningkat 4.0% kepada 74,893 unit pada 2023 berbanding tahun 2022. Selangor menyumbang jumlah tertinggi dengan 21,448 unit dan diikuti Johor dengan 10,456 unit. Mengikut jenis, penawaran terus tertumpu kepada kondominium/ pangsapuri, membentuk sekitar 34.1% (25,513 unit) daripada jumlah keseluruhan negara, manakala rumah teres dua hingga tiga tingkat membentuk 30.5% lagi (22,805 unit). Sebaliknya, mula dibina dan penawaran baharu dirancang masing-masing merosot 9.9% kepada 88,114 unit dan 9.1% kepada 80,964 unit, kedua-duanya diterajui Selangor dengan 19,865 unit bagi mula dibina dan 7,593 unit bagi penawaran baharu dirancang.

Sehingga akhir tahun, terdapat lebih daripada 6.2 juta unit kediaman sedia ada dengan hampir 0.39 juta dalam penawaran akan datang dan lebih 0.37 juta dalam penawaran dirancang.

Construction Activity

In the construction segment, housing completion were promising, up by 4.0% to 74,893 units in 2023 as compared to 2022. Selangor contributed the highest number with 21,448 units and followed by Johor with 10,456 units. By type, supply continued to focus on condominiums/apartments, formed around 34.1% (25,513 units) of the national total, while two to three storey terraced houses formed another 30.5% (22,805 units). Contrarily, starts and new planned supply declined by 9.9% to 88,114 units and 9.1% to 80,964 units respectively, both led by Selangor with 19,865 units for the former and 7,593 units for the latter.

As at year-end, there were more than 6.2 million existing residential units with nearly 0.39 million in the incoming supply and slightly more than 0.37 million in the planned supply.



Pergerakan Harga

Indeks Harga Rumah Malaysia (IHRM) berada pada 216.5 mata (RM467,144 seunit) dalam 2023^p dengan pertumbuhan tahunan sederhana 3.2%. Semua negeri utama mencatat pertumbuhan tahunan yang positif masing-masing didahului oleh Johor (6.2%), Pulau Pinang (3.8%), Selangor (2.9%) dan WP Kuala Lumpur (1.8%). Mengikut jenis rumah, rumah teres mencatatkan pertumbuhan tahunan tertinggi 3.7% diikuti oleh kediaman bertingkat tinggi (3.6%), berkembar (2.3%) dan sesebuah (1.4%).

Price Movements

The Malaysian House Price Index (MHPI) stood at 216.5 points (RM467,144 per unit) in 2023^p with a moderate annual growth of 3.2%. All major states recorded positive annual growth lead by Johor (6.2%), Pulau Pinang (3.8%), Selangor (2.9%) and WP Kuala Lumpur (1.8%) respectively. By house type, terraced houses recorded the highest annual growth of 3.7% followed by high-rise (3.6%), semi-detached (2.3%) and detached (1.4%).

Chart 11

MHPI: Point and Annual Changes by Type 2010 –2023^P

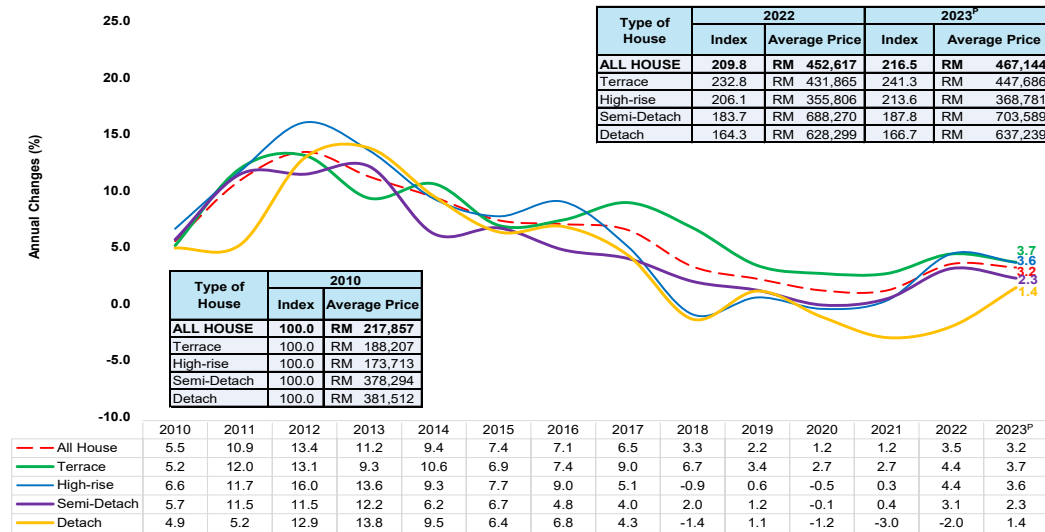
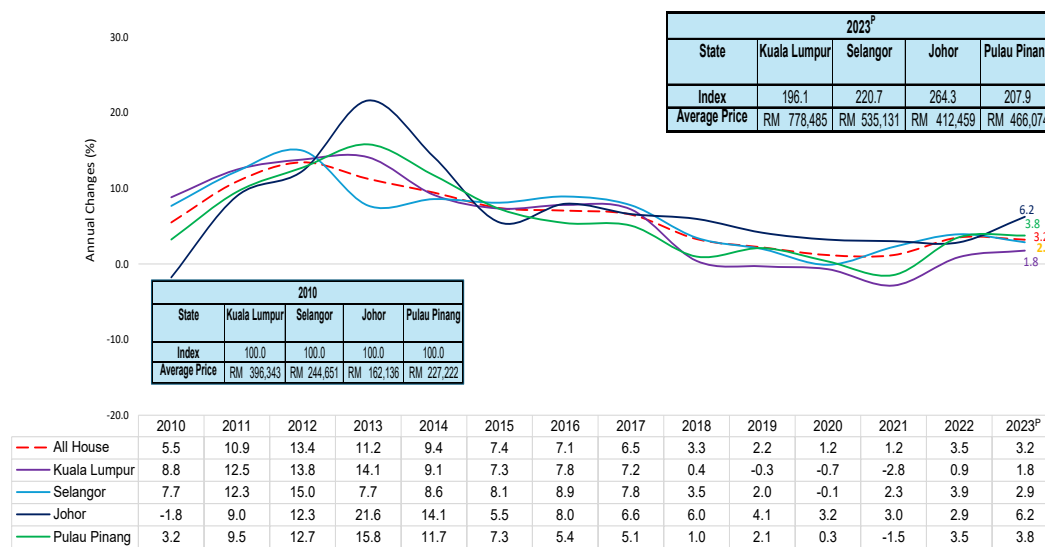


Chart 12

MHPI: Point and Annual Changes in Major States 2010 - 2023^P



Sewa

Pasaran sewa kediaman secara umumnya adalah stabil dengan pergerakan menaik direkodkan di beberapa kawasan yang mempunyai jaringan perhubungan yang cekap, bersebelahan dengan stesen LRT dan MRT serta yang terletak berhampiran institusi pengajian tinggi. Di WP Kuala Lumpur, pasaran kediaman secara amnya stabil untuk rumah teres manakala bagi kediaman bertingkat tinggi mencatatkan trend menaik di beberapa skim strata seperti Kondominium Mutiara Upper East, Hartamas Regency 2 dan Residensi Henge. Unit kondominium di The Oval, 10 Mon't Kiara, U Thant Residence dan Sunway Vivaldi memperoleh sewa yang lebih tinggi antara RM12,000 hingga RM15,000 sebulan.

Rental

The residential rental market was generally stable with upward movements recorded in several areas served with efficient connectivity, adjacent to LRT and MRT stations as well as those located nearby higher learning institutions. In WP Kuala Lumpur, residential market was generally stable for terraced houses while high-rise charted upward trend in several strata schemes namely Mutiara Upper East Condominium, Hartamas Regency 2 and Residensi Henge. Condominium units in The Oval, 10 Mon't Kiara, U Thant Residence and Sunway Vivaldi fetched higher rental ranging RM12,000 to RM15,000 per month.

Pasaran sewa di Selangor secara umumnya juga stabil dengan beberapa pergerakan menaik bagi rumah teres di daerah Petaling dan Gombak. Teres dua tingkat di Setia Eco Glade, Cyberjaya merekodkan sewa lebih tinggi antara RM3,250 hingga RM3,900 sebulan manakala sewa bagi jenis rumah yang sama di Mutiara Damansara antara RM2,300 hingga RM2,800 sebulan.

The rental market in Selangor was generally stable with some upward movements for terraced houses in Petaling and Gombak District. Double-storey terraced in Setia Eco Glade, Cyberjaya recorded higher rental ranging RM3,250 to RM3,900 per month while similar houses in Mutiara Damansara ranged from RM2,300 to RM2,800 per month.

Di wilayah selatan, pasaran sewa di Johor secara amnya stabil dengan beberapa pergerakan menaik untuk rumah teres dan unit pangsapuri kebanyakannya di Johor Bahru. Di Pulau Pinang, pasaran kediaman menunjukkan pasaran sewa yang stabil dengan beberapa pergerakan bercampur-campur bagi rumah teres dan unit strata. Seri Tanjung Pinang di Timur Laut menyaksikan sewa teres tiga tingkat mencapai RM3,600 hingga RM3,800 sebulan manakala teres dua tingkat di Eco Horizon (Fasa 1) mencatatkan sewa antara RM2,200 hingga RM3,200 sebulan.

In the southern region, the rental market in Johor was stable generally with several upward movements for terraced houses and apartment units mostly in Johor Bahru. In Pulau Pinang, residential market showed stable rental market with some mixed movements for terraced houses and strata units. Seri Tanjung Pinang in Timur Laut saw its three-storey terraced fetching rental of RM3,600 to RM3,800 per month while double storey terraced in Eco Horizon (Fasa 1) recorded rental ranging from RM2,200 to RM3,200 per month.

2.2 Harta Tanah Komersial

2.2 Commercial Property

Transaksi

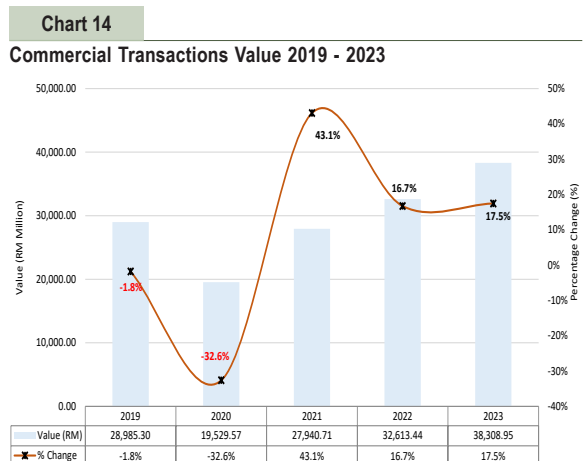
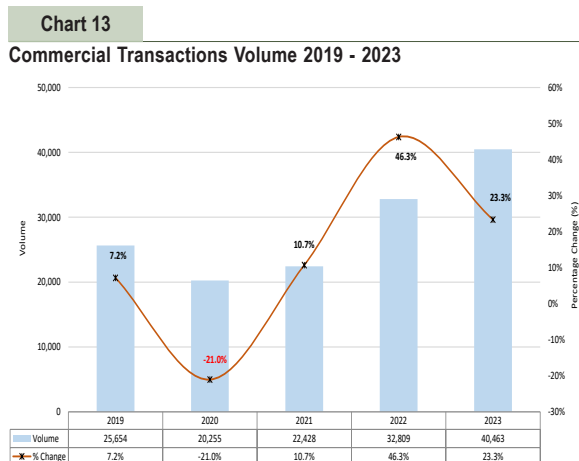
Transaction

Subsektor komersial merekodkan peningkatan dalam aktiviti pasaran. Terdapat 40,463 transaksi bernilai RM38.31 bilion direkodkan pada tahun 2023, meningkat 23.3% dalam bilangan dan 17.5% dalam nilai berbanding 2022 (32,809 transaksi bernilai RM32.61 bilion). Keadaan pasaran bertambah baik disumbangkan oleh peningkatan aktiviti di semua negeri dan transaksi utama melibatkan kompleks perniagaan dan pejabat binaan khas yang direkodkan dalam tempoh kajian.

The commercial sub-sector recorded an increase in market activity. There were 40,463 worth RM38.31 billion recorded in 2023, increased by 23.3% in volume and 17.5% in value as compared to 2022 (32,809 transactions worth RM32.61 billion). The improved market was contributed by the increased activities recorded in all states and major transactions involving shopping complex and purpose-built office recorded in the review period.

Selangor mengekalkan sumbangan tertinggi dalam bilangan dan nilai kepada bahagian pasaran negara, dengan 10,110 transaksi bernilai RM10.73 bilion, masing-masing merangkumi 25.0% dalam bilangan dan 28.0% dalam nilai. Johor dikedudukan kedua dengan 19.9% (8,041 transaksi) dan WP Kuala Lumpur merekodkan 15.5% (6,254 transaksi). Daripada aspek nilai, kedua tertinggi ialah WP Kuala Lumpur (RM8.06 bilion) dan diikuti Johor (RM6.15 bilion).

Selangor retained the highest contribution in volume and value to the national market share, with 10,110 transactions worth RM10.73 billion, accounting to 25.0% in volume and 28.0% in value respectively. Johor came second with 19.9% (8,041 transactions) and WP Kuala Lumpur recorded 15.5% (6,254 transactions). In terms of value, the second highest was WP Kuala Lumpur (RM8.06 billion) and followed by Johor (RM6.15 billion).



2.2.1 Kedai (Kedai Satu hingga Enam Setengah Tingkat dan Kedai Pra-Perang)

Transaksi

Segmen kedai merekodkan 18,437 transaksi bernilai RM16.10 bilion, menguasai 45.6% daripada bilangan transaksi harta tanah komersial dan 42.0% daripada jumlah nilai. Berbanding 2022, prestasi bilangan dan nilai pasaran bertambah baik, masing-masing mencatatkan peningkatan 9.3% dan 13.5% (2022: 16,862 transaksi bernilai RM14.2 bilion).

Johor menyumbang bilangan tertinggi kepada bahagian pasaran, dengan 20.7% (3,821 transaksi) dan diikuti Selangor dengan 16.9% (3,121 transaksi). Daripada segi nilai, Selangor mendahului dengan 26.9% (RM4.34 bilion) manakala Johor di tempat kedua dengan 20.8% (RM3.35 bilion) daripada jumlah nilai.

Mengikut jenis, kedai dua hingga dua setengah tingkat adalah yang paling aktif, menguasai 53.2% (9,803 transaksi) pasaran kedai, diikuti kedai tiga hingga tiga setengah tingkat, merekodkan 27.5% bahagian (5,067 transaksi).

Status Pasaran

Keadaan kedai siap dibina tidak terjual bertambah baik apabila bilangannya berkurangan kepada 6,233 unit dengan nilai RM5.39 bilion, turun 7.2% dalam bilangan dan 7.7% dalam nilai berbanding 2022. Sebaliknya, unit dalam pembinaan belum terjual dan belum dibina belum terjual menyaksikan sebaliknya, masing-masing meningkat 2.7% (2,852 unit) dan 24.9% (456 unit). Johor menyumbang lebih daripada 24.0% daripada bilangan kedai siap dibina tidak terjual dan 28.5% dalam nilai (1,517 unit bernilai RM1.54 bilion) serta unit dalam pembinaan belum terjual dengan 36.3% bahagian (1,036 unit). Walaubagaimanapun, kedai siap dibina tidak terjual di Johor menunjukkan prestasi yang lebih baik, apabila bilangan dan nilai susut masing-masing 12.3% dan 8.2%.

2.2.1 Shop (One to Six and A-half Storey Shop and Pre-war Shop)

Transaction

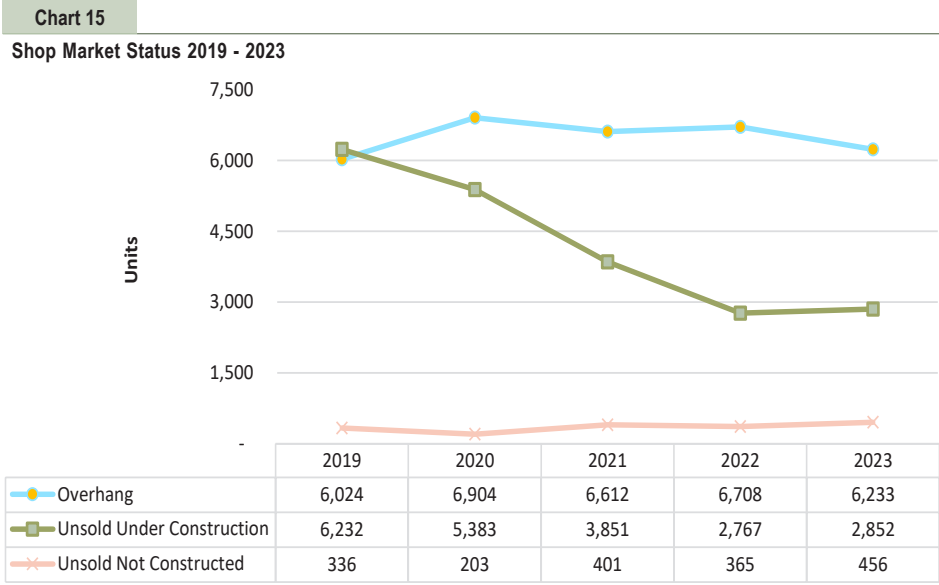
Shop segment recorded 18,437 transactions worth RM16.10 billion, dominating 45.6% of the commercial property transactions volume and 42.0% of the total value. Against 2022, market performance improved in volume and value, recorded an increase of 9.3% and 13.5% respectively (2022: 16,862 transactions worth RM14.2 billion).

Johor contributed the highest volume to the market share, with 20.7% (3,821 transactions) and followed by Selangor with 16.9% (3,121 transactions). In term of value, Selangor led with 26.9% (RM4.34 billion) while Johor came second with 20.8% of the total value (RM3.35 billion).

By type, two to two and a-half storey shops were the most active, capturing 53.2% (9,803 transactions) of the shops' market share, followed by three to three and a-half storey shops, registering 27.5% share (5,067 transactions).

Market Status

The shop overhang situation slightly improved as the numbers reduced to 6,233 units with a value of RM5.39 billion, drop by 7.2% in volume and 7.7% in value against 2022. Contrarily, the unsold under construction and not constructed saw the reverse, up by 2.7% (2,852 units) and 24.9% (456 units) respectively. Johor contributed for more than 24.0% of shop overhang volume and 28.5% in value (1,517 units worth RM1.54 billion) and the unsold under construction units with 36.3% share (1,036 units). Nevertheless, shop overhang in Johor showed better performance, as the volume and value declined by 12.3% and 8.2% respectively.

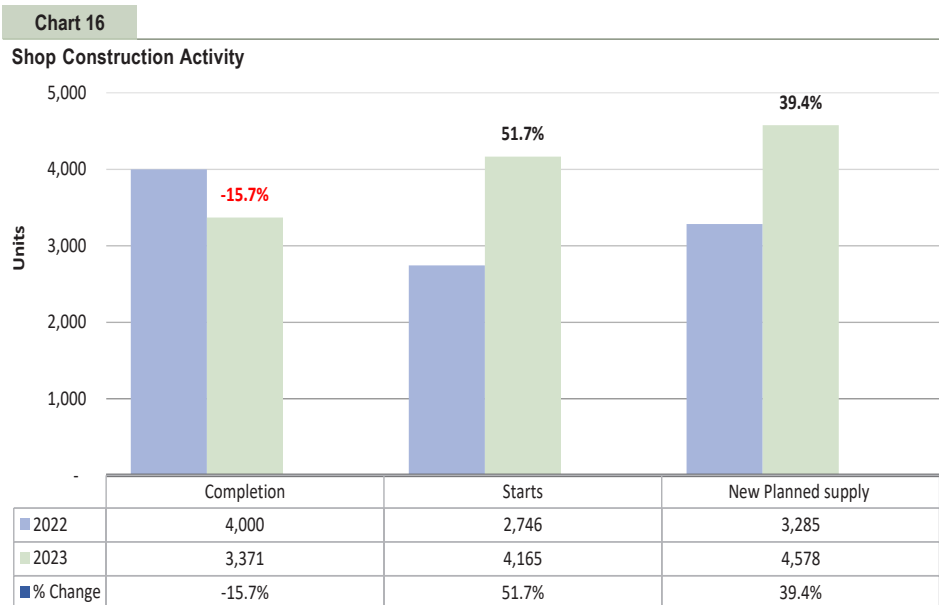


Aktiviti Pembinaan

Dari segi penawaran, aktiviti pembinaan sederhana aktif pada tempoh kajian. Mula dibina dan penawaran baharu dirancang, masing-masing meningkat 51.7% kepada 4,165 unit and 39.4% to 4,578 unit, manakala siap dibina menurun 15.7% kepada 3,371 unit. Pada akhir tahun, terdapat hampir 565,000 kedai sedia ada dengan lebih daripada 25,000 unit dalam penawaran akan datang dan hampir 30,000 unit dalam penawaran yang dirancang.

Construction Activity

On the supply front, construction activity was moderately active in the review period. Starts and new planned supply increased by 51.7% to 4,165 units and 39.4% to 4,578 units respectively while completion declined by 15.7% to 3,371 units. As at year-end, there were nearly 565,000 existing shops with more than 25,000 units in the incoming supply and nearly 30,000 units in the planned supply.



Harga

Harga kedai menyaksikan prestasi bercampur-campur secara menyeluruh. Di WP Kuala Lumpur, kedai dua tingkat di Lucky Garden dan Taman Midah ditransaksikan pada harga RM2 juta hingga RM5 juta, masing-masing meningkat 13.1% dan 8.3%. Sementara itu, kedai empat tingkat di Bandar Sri Permaisuri dipindahmilik RM3.75 juta, meningkat 14.8%. Di Selangor, kedai dua tingkat di Seksyen 28, Shah Alam ditransaksikan daripada RM1.40 juta hingga RM1.50 juta, meningkat 11.5% manakala di Bandar Puchong Utama meningkat 9.3%, dipindahmilik RM2.35 juta. Di Johor, harta tanah serupa di Taman Ungku Tun Aminah dan Taman Setia Indah, Johor Bahru masing-masing meningkat 10.4% dan 9.5% kepada RM780,000 - RM1.10 juta dan RM900,000 - RM1.29 juta. Di Pulau Pinang, kedai dua tingkat di Kawasan Jalan Perak, Timur Laut juga mengalami peningkatan marginal 11.1% dipindahmilik RM1.50 juta. Walaubagaimanapun, Taman Carissa Villa in Seberang Perai Utara menyaksikan penurunan harga 14.1% kepada RM1.10 juta (2022: RM1.28 juta).

Sewa

Sewaan kedai tingkat bawah secara umumnya stabil dengan beberapa pergerakan direkodkan di lokasi terpilih. Di WP Kuala Lumpur, sewa tingkat bawah kedai kekal tinggi di Changkat Bukit Bintang daripada RM22,000 hingga RM30,000 sebulan. Kedai di Jalan Tuanku Abdul Rahman dan Jalan Ipoh masing-masing mencatatkan penurunan 11.3% dan 6.8%. Di Selangor, sewa kekal stabil dengan daerah Petaling, Gombak dan Hulu Selangor menyaksikan pergerakan bercampur-campur. Batu Caves Centrepoint dan Taman Melawati masing-masing mencatatkan peningkatan 10.3% dan 8.8%. Pekan Rawang dan Rawang Intergated mengalami sedikit penurunan 4.5% hingga 6.4% dengan sewa antara RM2,000 hingga RM2,200 sebulan.

Di Johor Bahru, sewa kedai tingkat bawah stabil di kawasan utama pusat bandar, manakala Jalan Wong Ah Fook dan Jalan Station kekal tinggi pada kadar sewa RM6,900 hingga RM14,000 sebulan. Sewa meningkat sedikit untuk unit dengan keluasan lantai lebih besar di Taman Mount Austin dan Taman Austin Perdana masing-masing 6.7% dan 5.2%. Di Pulau Pinang, sewa kedai tingkat bawah stabil kecuali kawasan utama pinggir bandar yang menunjukkan pergerakan bercampur-campur. Kedai baharu dengan reka bentuk moden seperti Juru Sentral dan Elevate @ Gravitas mencatatkan kadar sewa yang tinggi antara RM7,000 hingga RM10,000 sebulan dan RM5,000 hingga RM7,000 sebulan.

Price

Prices of shops witnessed mixed performance across the board. In WP Kuala Lumpur, double storey shops in Lucky Garden and Taman Midah were transacted at RM2 million to RM5 million, increased by 13.1% and 8.3% respectively. Meanwhile, four storey shop in Bandar Sri Permaisuri was transacted at RM3.75 million, increased by 14.8%. In Selangor, two storey shops in Seksyen 28, Shah Alam was transacted from RM1.40 million to RM1.50 million, increased by 11.5% while in Bandar Puchong Utama increased by 9.3%, transacted at RM2.35 million. In Johor, similar property in Taman Ungku Tun Aminah and Taman Setia Indah, Johor Bahru increased by 10.4% and 9.5% to RM780,000 – RM1.10 million and RM900,000 - RM1.29 million respectively. In Pulau Pinang, double storey shops in Kawasan Jalan Perak, Timur Laut also experienced a marginal increase of 11.1% transacted at RM1.50 million. However, Taman Carissa Villa in Seberang Perai Utara witnessed price declined 14.1% to RM1.10 million (2022: RM1.28 million).

Rental

Ground floor shop rentals were generally stable with a several movements recorded in selected locations. In WP Kuala Lumpur, ground floor shop rents remained high in Changkat Bukit Bintang from RM22,000 to RM30,000 per month. Shops at Jalan Tuanku Abdul Rahman and Jalan Ipoh recorded a decrease of 11.3% and 6.8% respectively. In Selangor, rents remained stable with Petaling, Gombak and Hulu Selangor district saw mixed movements. Batu Caves Centrepoint and Taman Melawati recorded an increase of 10.3% and 8.8% respectively. Pekan Rawang and Rawang Intergated experienced a slight decrease of 4.5% to 6.4% with rental ranging from RM2,000 to RM2,200 per month.

In Johor Bahru, ground floor shop rents were stable in the central town prime area, while Jalan Wong Ah Fook and Jalan Station remained high at RM6,900 to RM14,000 per month. Rental increased slightly for larger floor area unit in Taman Mount Austin and Taman Austin Perdana by 6.7% and 5.2% respectively. In Pulau Pinang, ground floor shop rents were stable except suburban prime area showing a mixed movement. New shops with modern designs such as Juru Sentral and Elevate @ Gravitas recorded high rental rates ranging from RM7,000 to RM10,000 per month and RM5,000 to RM7,000 per month.

2.2.2 Pangsapuri Khidmat

Transaksi

Prestasi pasaran bagi pangsapuri khidmat merekodkan pertumbuhan kukuh, meningkat 67.4% dalam bilangan kepada 11,416 transaksi dan 69.1% dalam nilai kepada RM7.60 bilion berbanding 2022 (6,821 transaksi bernilai RM4.50 bilion). Segmen pangsapuri khidmat membentuk 28.2% daripada jumlah transaksi dan 19.8% daripada jumlah nilai harta tanah komersial. Mengikut negeri, WP Kuala Lumpur dan Selangor menyumbang jumlah yang lebih tinggi kepada jumlah nasional, masing-masing dengan syer 33.8% (3,863 transaksi) dan 31.4% (3,588 transaksi).

Status Pasaran

Segmen siap dibina tidak terjual pangsapuri khidmat bertambah baik dengan 20,825 unit siap dibina tidak terjual bernilai RM16.63 bilion, turun 13.1% dalam bilangan dan 17.7% dalam nilai berbanding 2022 (23,978 unit dengan nilai RM20.19 bilion). Mengikut julat harga, sebahagian besar unit siap dibina tidak terjual dalam lingkungan harga melebihi RM500,000 hingga RM1 juta menyumbang 61.4% (12,785 unit) daripada jumlah keseluruhan dan diikuti harga melebihi RM1 juta yang membentuk 20.2% lagi (4,204 unit).

Mengikut negeri, Johor merekodkan unit pangsapuri khidmat siap dibina tidak terjual tertinggi melibatkan 56.2% syer dalam bilangan (11,710 unit) dan 58.4% dalam nilai (RM9.72 bilion); hampir kesemua unit tidak terjual ini berada di Daerah Johor Bahru (11,681 unit).

Unit dalam pembinaan belum terjual dan belum dibina belum terjual menurun seiring, masing-masing berkurang 28.1% (23,795 unit) dan 38.0% (6,604 unit). WP Kuala Lumpur memegang jumlah tertinggi unit dalam pembinaan belum terjual, dengan 37.7% syer (8,974 unit), diikuti Selangor dengan 28.5% syer (6,774 unit) dan Johor 19.8% (4,722 unit).

2.2.2 Serviced Apartment

Transaction

Market performance for serviced apartment recorded strong growth, increased by 67.4% in volume to 11,416 transactions and 69.1% in value to RM7.60 billion against 2022 (6,821 transactions worth RM4.50 billion). Serviced apartment segment formed 28.2% of the commercial property transactions volume and 19.8% of the value. By state, WP Kuala Lumpur and Selangor contributed higher national market volume to the national total, each with 33.8% (3,863 transactions) and 31.4% (3,588 transactions) market share.

Market Status

Serviced apartment overhang segment improved with 20,825 overhang units worth RM16.63 billion, down by 13.1% in volume and 17.7% in value against 2022 (23,978 units with a value of RM20.19 billion). By price range, most of the overhang fell in price brackets above RM500,000 to RM1 million accounted for 61.4% (12,785 units) of total and followed by above RM1 million which formed another 20.2% (4,204 units).

By state, Johor recorded the highest serviced apartment overhang units with 56.2% share in volume (11,710 units) and 58.4% share in value (RM9.72 billion); almost all of these overhang units were in Johor Bahru District (11,681 units).

The unsold under construction and unsold not constructed decreased in tandem, down by 28.1% (23,795 units) and 38.0% (6,604 units) respectively. WP Kuala Lumpur held the highest number of unsold under construction, with 37.7% share in volume (8,974 units), followed by Selangor with 28.5% share (6,774 units) and Johor 19.8% (4,722 units).

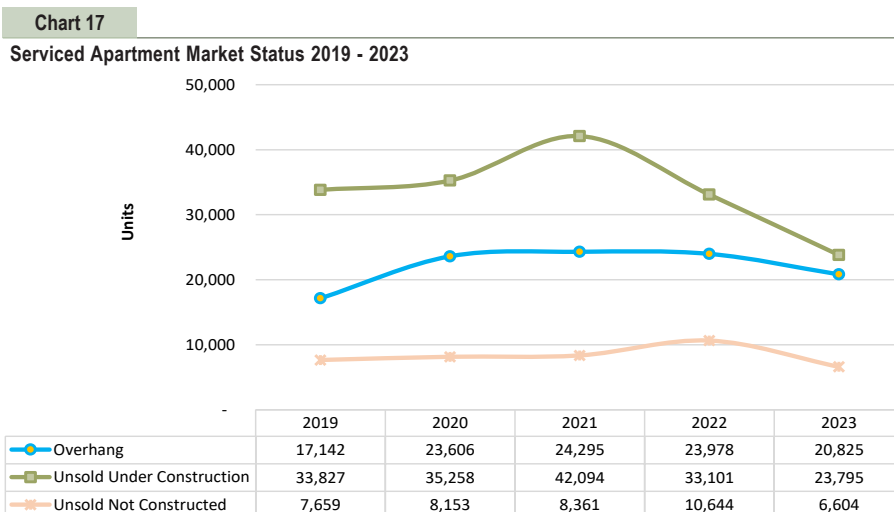
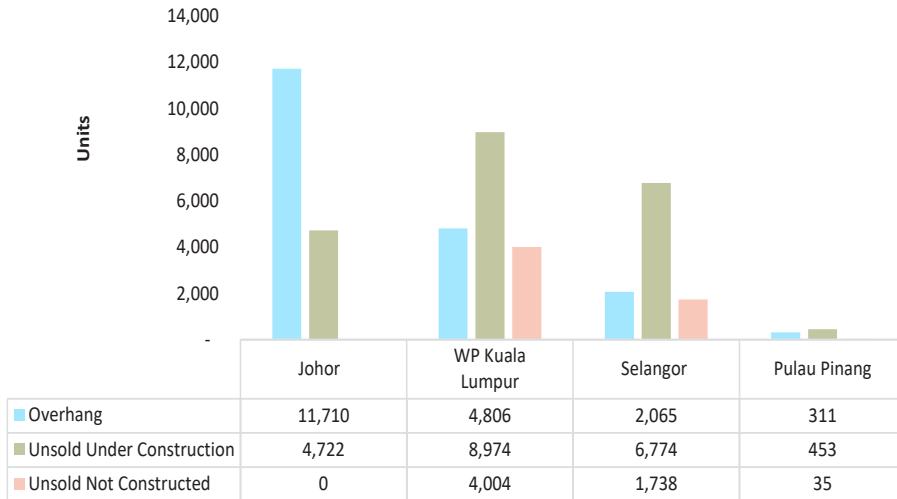


Chart 18

Serviced Apartment Market Status in Major States 2023



Aktiviti Pembinaan

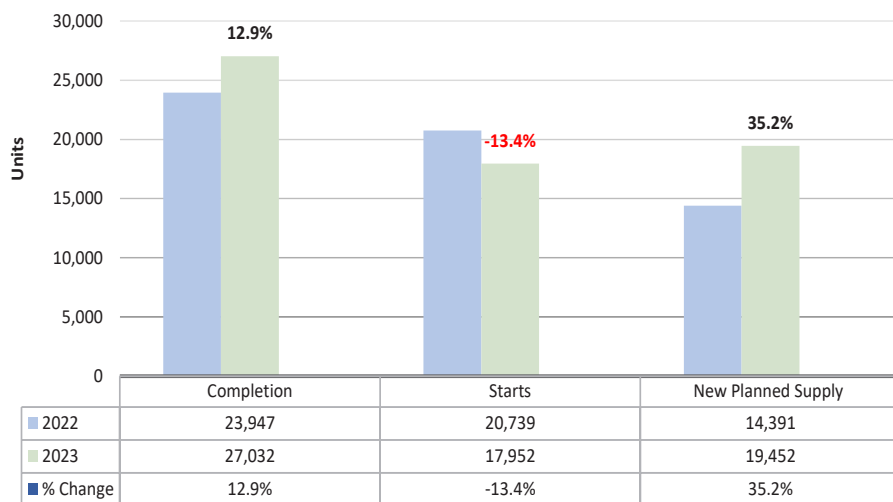
Daripada segi penawaran, aktiviti pembinaan menyaksikan trend bercampur-campur dengan siap dibina dan penawaran baharu dirancang masing-masing meningkat 12.9% kepada 27,032 unit dan 35.2% kepada 19,452 unit. Sebaliknya, mula dibina merosot 13.4% kepada 17,952 unit. Pada akhir tahun, terdapat lebih daripada 370,000 unit pangsapuri khidmat sedia ada dengan lebih daripada 153,000 unit dalam penawaran akan datang dan 125,000 unit dalam penawaran yang dirancang.

Construction Activity

On the supply front, construction activity saw mixed trend with completion and new planned supply increased by 12.9% to 27,032 units and 35.2% to 19,452 units respectively. Contrarily, starts declined by 13.4% to 17,952 units. As at year-end, there were more than 370,000 existing serviced apartment units with more than 153,000 units in the incoming supply and 125,000 units in the planned supply.

Chart 19

Serviced Apartment Construction Activity



Harga dan Sewa

Harga pangsapuri khidmat menunjukkan prestasi bercampur-campur di beberapa lokasi. Di WP Kuala Lumpur, pangsapuri khidmat berharga melebihi RM2 juta, iaitu Bayan Tree Signature dan The Greens merekodkan peningkatan harga 6.6% hingga 12.4%. Jenis harta tanah yang sama yang dipindahmilik kurang RM1 juta seperti G Residence, 231 TR Service Suites dan Residensi Damai Indah juga masing-masing meningkat 13.2%, 18.5% dan 14.7%. Namun begitu, One @ Bukit Ceylon, Rica Residence Sentul, Flexus Signature, Suite Enesta Kepong dan Verve Suites KL South masing-masing menguncup 15.4%, 14.8%, 16.3%, 24.6% dan 14.5%. Di Selangor, pangsapuri khidmat juga menyaksikan prestasi bercampur-campur dengan kenaikan harga dicatatkan di semua daerah kecuali Kuala Langat. Kediaman Greenfield - PJS 8 dipindahmilik melebihi RM1 juta, meningkat 9.5%. Begitu juga, harga pangsapuri khidmat di Johor Bahru menunjukkan prestasi bercampur-campur dengan Residensi Laman Lapan meningkat 6.0% hingga 9.9%, dipindahmilik daripada RM400,000 hingga RM550,000.

Pasaran sewa secara amnya stabil di WP Kuala Lumpur dan Selangor dengan beberapa pergerakan direkodkan di beberapa lokasi. Purata hasil sewa kasar di seluruh negeri berada dalam julat 1.5% hingga 6.4%. Di Kuala Lumpur, Arcoris Mont Kiara mencatatkan sedikit peningkatan 9.3% dengan sewa antara RM3,200 hingga RM4,600 sebulan. Begitu juga, Dataran Emerald @ Emerald Avenue di Gombak, Selangor menyaksikan peningkatan sebanyak 9.7% walaupun pada julat sewa yang lebih rendah iaitu RM1,100 hingga RM1,500 sebulan manakala Subang Park Home merekodkan kadar sewa yang tinggi antara RM2,500 hingga RM3,500 sebulan.

2.2.3 Kompleks Perniagaan

Transaksi

Tahun kajian merekodkan sembilan belas transaksi kompleks perniagaan dengan nilai terkumpul RM722.87 juta; sembilan di Selangor, masing-masing dua di Negeri Sembilan, Johor dan Perak dan masing-masing satu di Kuala Lumpur, Kelantan, Sabah dan Sarawak. Tujuh daripadanya merupakan perjanjian jual beli bertarikh pada tahun 2021 dan 2022 tetapi dimuktamadkan pada tahun 2023.

Price and Rental

Prices of serviced apartments showed a mixed performance in a few locations. In WP Kuala Lumpur, serviced apartments priced above RM2 million, namely Bayan Tree Signature and The Greens recorded price increased by 6.6% to 12.4%. Similar property type transacted below RM1 million such as G Residence, 231 TR Service Suites and Residensi Damai Indah also increased by 13.2%, 18.5% and 14.7% respectively. Nevertheless, the One @ Bukit Ceylon, Rica Residence Sentul, Flexus Signature, Suite Enesta Kepong and Verve Suites KL South contracted at 15.4%, 14.8%, 16.3%, 24.6% and 14.5% respectively. In Selangor, serviced apartments also witnessed mixed performance with price increased recorded in all districts except Kuala Langat. Greenfield Residence - PJS 8 was transacted above RM1 million, increased by 9.5%. Similarly, serviced apartment prices in Johor Bahru showed a mixed performance with Residensi Laman Lapan increased by 6.0% to 9.9%, transacted from RM400,000 to RM550,000.

The rental market was generally stable in WP Kuala Lumpur and Selangor with some movements recoded in a few locations. Average gross rental yield across the states were in the range of 1.5% to 6.4%. In Kuala Lumpur, Arcoris Mont Kiara recorded a slight increase of 9.3% with rental ranging from RM3,200 to RM4,600 per month. Similarly, Dataran Emerald @ Emerald Avenue in Gombak, Selangor saw an increase of 9.7% though at a lower rental range of RM1,100 to RM1,500 per month while Subang Park Home recorded high rental rates ranging from RM2,500 to RM3,500 per month.

2.2.3 Shopping Complex

Transaction

The reviewed year recorded nineteen shopping complex transactions with an accumulative worth of RM722.87 million; nine in Selangor, two each in Negeri Sembilan, Johor and Perak and one each in Kuala Lumpur, Kelantan, Sabah and Sarawak. Seven had its sale and purchase agreements dated in 2021 and 2022 but concluded in 2023.

Among the major transactions are as listed below:

No	State	Lot / Name of Property	Location/Mukim/ Daerah	Transaction Year	Consideration (RM)
1	Selangor	Giant Kemuning Utama	Jalan Kemuning Prima E33/E, Kemuning Utama/ Klang	2023	45,000,000
2	Selangor	Econsave Puncak Alam	Pusat Perdagangan Alam Jaya/ Ijok/ Kuala Selangor	2023	25,000,000
3	Selangor	Econsave Batang Kali	Jalan Mahagoni 8, Bandar Utama/ Batang Kali/ Hulu Selangor	2023	24,500,000
4	Selangor	Tropicana City Mall	Jalan SS20/27	2023	52,000,000
5	Selangor	Giant Taman Putra Permai	Jalan Putra Permai, Taman Putra Permai	2023	50,419,000
6	Selangor	KIPMALL Sentral Kota Warisan	Warisan Sentral 3, Kota Warisan	2023	80,000,000
7.	Selangor	Giant Seksyen 18, Shah Alam	Jalan Pinang D, Seksyen 18, Shah Alam/ Petaling	2021	12,500,000
8.	WP Kuala Lumpur	Giant Setapak	Jalan Kilang, Wangsa Maju/ Kuala Lumpur	2023	101,000,000
9.	Kelantan	AEON Mall	Lembah Sirih/ Bandar Kota/ Kota Bahru	2023	165,000,000
10.	Negeri Sembilan	Giant Kuala Pilah	Jalan Kuala Pilah-Seremban/ Ampang Tinggi/ Kuala Pilah	2023	25,600,000
11.	Negeri Sembilan	Pasaraya TF Value Mart	PD Waterfront/ Port Dickson	2022	23,800,000
12.	Perak	Econsave Bandar Baru Kampar	Bandar Baru Kampar/ Kampar	2022	17,000,000
13.	Sabah	Econsave	Jalan Pantai, First Palm City Centre/ Lahad Datu	2022	18,000,000
14.	Sarawak	Lepapa Hypermarket Sri Aman	Jalan Sabu, Sri Aman Square/ Bahagian Sri Aman	2021	10,000,000

Gambaran Keseluruhan
Overview

Overview 21

Penghunian dan Ketersediaan Ruang

Prestasi kompleks perniagaan menyaksikan pertumbuhan sederhana pada tahun 2023, apabila kadar penghunian meningkat sedikit kepada 77.4%. Sejajar dengan itu, ruang tersedia berkurangan kepada 4 juta m.p. (2022: 4.31 juta s.m.) daripada 818 bangunan di seluruh negara. Kadar ketersediaan menurun seiring kepada 22.6%. Hanya enam negeri mencatatkan kadar penghunian melebihi 80.0%. Negeri Sembilan dan Melaka merekodkan negeri dengan kadar penghunian terendah dalam negara masing-masing 67.7% dan 62.4%.

Berdasarkan ketersediaan ruang, Selangor mencatatkan jumlah tertinggi dalam negara, menguasai 20.1% (804,302 m.p.) daripada jumlah keseluruhan. Johor dikedudukan kedua dengan 18.1% (722,964 m.p.) dan diikuti WP Kuala Lumpur dengan 13.9% (557,356 m.p.).

Occupancy and Space Availability

The performance of shopping complex witnessed moderate growth in 2023, as the occupancy rate increased slightly to 77.4%. Correspondingly, the available space reduced to 4 million s.m. (2022: 4.31 million s.m.) from the 818 buildings throughout the country. The availability rate decreased in tandem to 22.6%. Only sixes states recorded occupancy rate of more than 80.0%. Negeri Sembilan and Melaka recorded among the lowest occupancy rates in the country at 67.7% and 62.4% respectively.

Based on the availability of space, Selangor recorded the highest number in the country, dominating 20.1% (804,302 s.m.) of the national total. Johor ranked second with 18.1% (722,964 s.m.) and followed by WP Kuala Lumpur with 13.9% (557,356 s.m.).

Chart 20

Supply and Occupancy of Shopping Complex 2019 - 2023

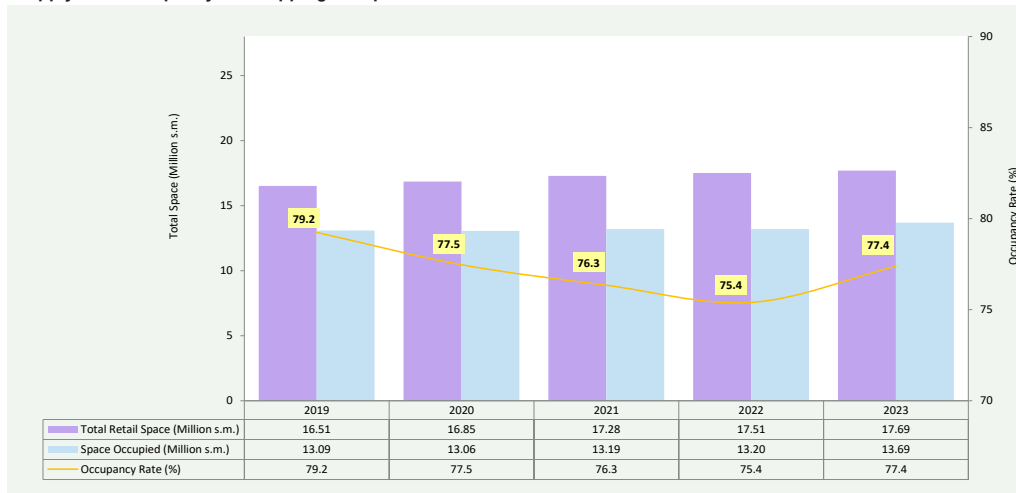
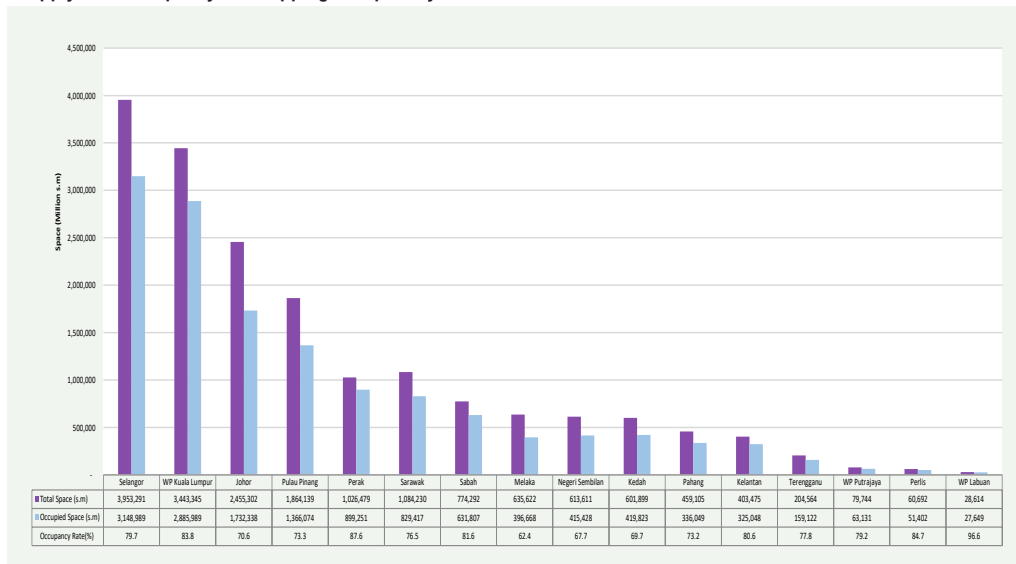


Chart 21

Supply and Occupancy of Shopping Complex by State 2023



Aktiviti Pembinaan

Sembilan kompleks baharu siap dibina dalam tempoh kajian, menambah hampir 220,000 m.p. ruang niaga ke dalam pasaran. Pada akhir tahun, terdapat sekitar 17.69 juta m.p. ruang niaga sedia ada daripada 1,074 kompleks perniagaan; majoritinya adalah pusat membeli-belah (556 bangunan; 13.41 juta m.p.). Selangor mendominasi ruang niaga sedia ada, 155 kompleks perniagaan menawarkan lebih daripada 3.95 juta m.p. Terdapat 33 kompleks lagi dengan 1.13 juta m.p. dalam penawaran akan datang dan 10 kompleks hampir 0.35 juta m.p. dalam penawaran yang dirancang.

Construction Activity

Nine new complexes completed in the review period, adding nearly 220,000 s.m. of retail space into the market. As at year-end, there were around 17.69 million s.m. existing retail space from 1,074 shopping complexes; majority of which were shopping centres (556 buildings; 13.41 million s.m.). Selangor dominated the existing retail space, contributed 155 shopping complexes offering more than 3.95 million s.m. respectively. There were another 33 complexes with 1.13 million s.m. in the incoming supply and 10 complexes with nearly 0.35 million s.m. in the planned supply.

The following shopping complexes were completed in 2023:

State	Name of Property	Location	Nett Lettable Area (s.m.)
WP Kuala Lumpur	Chow Kit Trade Centre	Jalan Abdul Rahman Idris	3,219
	Pavilion Damansara Heights (Fasa 1)	Jalan Damansara	52,903
	The Exchange TRX Mall	Persiaran TRX	125,415
Negeri Sembilan	Pilah Gateway	Jalan Melang, Kuala Pilah	2,621
	Econsave Port Dickson	Jalan Seremban-Port Dickson	5,534
Perlis	Plaza Niaga Padang Besar	Jalan Kangar - Padang Besar	4,271
Johor	Lotus's Kluang	Jalan Batu Pahat	5,852
Pahang	Lotus's Indera Mahkota	Bandar Indera Mahkota	9,894
Total	9 complexes		218,828

Sewa

Sewaan ruang niaga secara amnya adalah stabil di Lembah Klang dengan pergerakan bercampur-campur di kompleks terpilih. Suria KLCC memperoleh jualan sewaan tertinggi setiap bulan daripada RM376 s.m.p. hingga setinggi RM2,226 s.m.p. di aras concourse, mencatatkan beberapa peningkatan 2.6% hingga 9.9%. Sewaan di Avenue K merekodkan peningkatan 2.8% hingga 6.2% dengan sewa antara RM59.20 s.m.p. hingga RM361 s.m.p. Di Selangor, The Curve Mutiara Damansara menikmati pertumbuhan sederhana 2.7% di aras 2 dengan sewa antara RM23.70 s.m.p. hingga RM418.00 s.m.p. Begitu juga, Starling Mall merekodkan pertumbuhan positif sebanyak 5.5% di tingkat bawah tanah dengan sewa antara RM53 s.m.p. hingga RM215 s.m.p. Di Johor, sewa ruang niaga juga stabil dengan kadar sewa tertinggi direkodkan di Larkin Sentral likungan antara RM78 s.m.p. hingga RM559 s.m.p.

2.2.4 Pejabat Binaan Khas

Transaksi

Pada tahun 2023, dua puluh lapan transaksi bangunan pejabat telah direkodkan dengan nilai terkumpul RM1.63 bilion. Sembilan mempunyai perjanjian jual beli bertarikh dalam 2021 dan 2022 tetapi dimuktamadkan pada tahun 2023.

Rental

Rentals of retail space were generally stable in Klang Valley with mixed movements in selected complexes. Suria KLCC fetched the highest rental range per month from RM376 p.s.m. to as high as RM2,226 p.s.m. at concourse level, charting some increase of 2.6% to 9.9%. Rental at Avenue K recorded an increase of 2.8% to 6.2% with rental ranging from RM59.20 p.s.m. to RM361 p.s.m. In Selangor, The Curve Mutiara Damansara enjoyed a moderate growth of 2.7% at level 2 with rental ranging from RM23.70 p.s.m. to RM418.00 p.s.m. Likewise, Starling Mall recorded positive growth of 5.5% at basement level with rental ranging from RM53 p.s.m. to RM215 p.s.m. In Johor, rentals of retail space also stable with high rental rates recorded in Larkin Sentral ranging from RM78 p.s.m. to RM559 p.s.m.

2.2.4 Purpose-Built Office

Transaction

In 2023, twenty-eight office building transactions with an accumulated worth RM1.63 billion were recorded. Nine had its sale and purchase agreements dated in 2021 and 2022 but concluded in 2023.

The summary of major transactions are as listed below:

No	State	Name of Property	Location	Transaction Year	Consideration (RM)
1	WP Kuala Lumpur	Menara HSBC	Leboh Ampang, Kuala Lumpur	2023	55,000,000
2	WP Kuala Lumpur	Plaza VADS	Taman Tun Dr Ismail, Kuala Lumpur	2022	137,300,000
3	Selangor	Data Centre NTT MSC	Persiaran APEC, Cyberjaya	2021	319,800,000
4	Pulau Pinang	Bangunan MCIS Zurich	Jalan Argyll, Georgetown	2023	14,000,000
5	Johor	Permas Point	Bandar Baru Permas Jaya, Johor Bahru	2022	11,000,000
6	Perak	Bangunan M & A	Jalan Sultan Idris Shah, Kinta	2022	13,800,000
7	Kedah	Blok B, Kompleks Pembangunan Asnaf	Jalan Sultanah, Bandar Alor Setar	2023	8,088,000
8	WP Kuala Lumpur	The Weld	Jalan Raja Chulan/Kuala Lumpur	2022	305,000,000
9	Pulau Pinang	Menara Euro	Lebuh Pantai, Georgetown	2023	12,000,000
10	Selangor	QI Tower	Block C, Jalan Barat, Section 8, Petaling Jaya	2023	88,810,000
11	Selangor	Blok A, Wisma Speedy	Taman Ampang Hilir, Ampang	2023	10,380,000
12	Selangor	Cyberview Gardens Villa	Cyberview Gardens, Persiaran Multimedia, Cyberjaya	2022	57,500,000
13	Selangor	Emerio Building Cyberjaya	Lingkar Teknokrat 3, Cyberjaya	2022	49,000,000
14	Selangor	Bangunan MCIS Zurich	Jalan Argyll, Georgetown	2023	16,000,000
15	WP Kuala Lumpur	Blok B, Plaza Damansara	Bukit Damansara, Kuala Lumpur	2023	73,000,000
16	WP Kuala Lumpur	Menara AA	Jalan Tun Razak, Kuala Lumpur	2023	81,000,000
17	WP Putrajaya	Menara Tulus	Persiaran Perdana, Presint 3, Putrajaya	2023	148,000,000
18	Selangor	Blok C, Lot 6875	Jalan Kolam Air Lama, Ampang Jaya	2023	14,000,000
19	Selangor	Blok A dan B, Lot 15686	Jalan Kolam Air Lama, Ampang Jaya	2022	21,000,000

Penghunian dan Ketersediaan Ruang

Prestasi keseluruhan segmen pejabat adalah stabil dalam tempoh kajian apabila kadar penghunian keseluruhan kekal 78.5% seperti yang direkodkan pada tahun lepas. Bangunan pejabat swasta merekodkan kadar penghunian purata 71.9%, meningkat sedikit daripada 71.7% pada tahun 2022. Pulau Pinang memperoleh kadar penghunian lebih tinggi pada kadar 80.3% manakala Kuala Lumpur, Selangor dan Johor mencatatkan penghunian lebih rendah daripada paras nasional masing-masing 70.4%, 71.1% dan 60.3%. Bangunan pejabat swasta di Putrajaya merekodkan kadar penghunian terendah dalam negara ini iaitu 52.4%.

Occupancy and Space Availability

The overall performance of office segment was stable in the review period as the overall occupancy rate remained 78.5% as recorded in previous year. The private office buildings recorded average occupancy rate at 71.9%, a slight up from 71.7% in 2022. Pulau Pinang secured a higher occupancy rate at 80.3% while Kuala Lumpur, Selangor and Johor recorded lower than the national level at 70.4%, 71.1% and 60.3% respectively. Private office buildings in Putrajaya recorded the lowest occupancy rate in the country at 52.4%.

Chart 22

Supply and Occupancy of Purpose-Built Office (Private & Government) 2019 - 2023



Chart 23

Supply and Occupancy of Purpose-Built Office (Private & Government) by State 2023

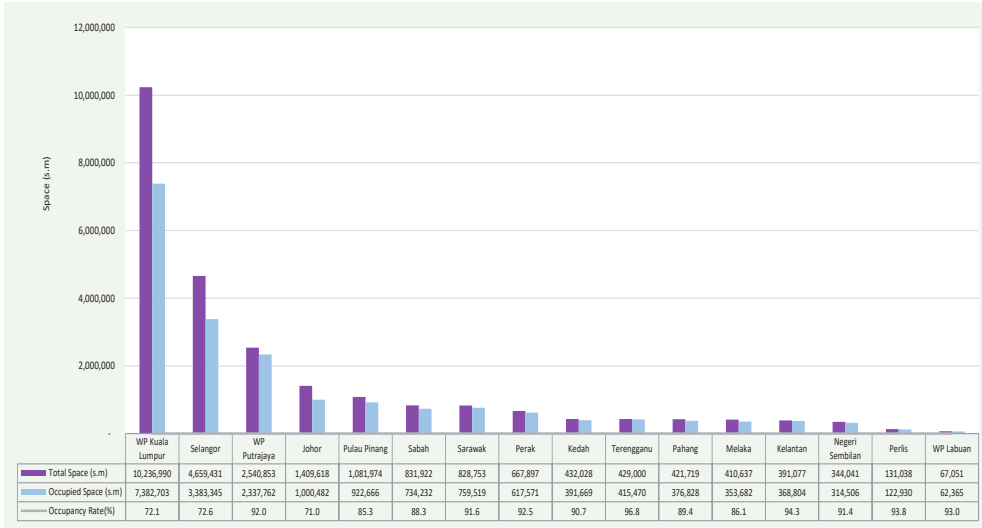
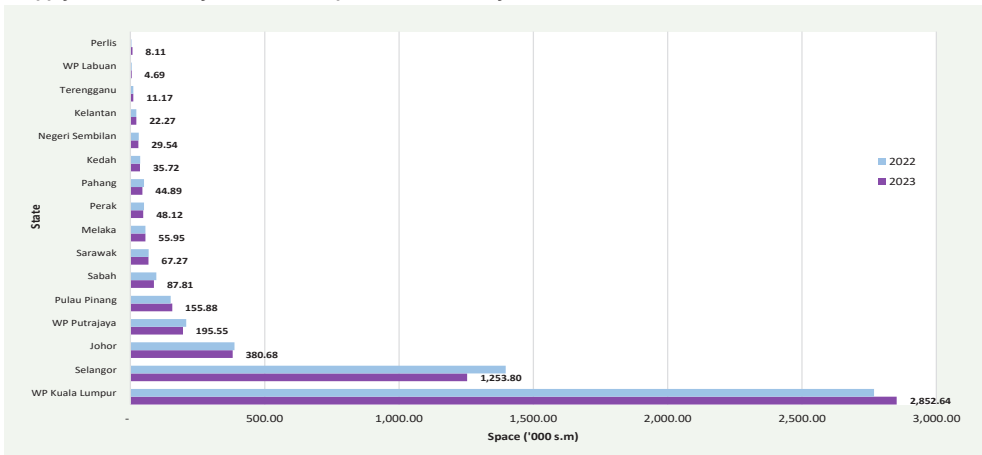


Chart 24

Supply and Availability of Private Purpose-Built Office by State 2023



Aktiviti Pembinaan

Terdapat 13 bangunan baharu siap dibina yang menawarkan ruang pejabat hampir 0.40 juta m.p. berbanding 2022 (10 baharu siap dibina; 0.42 juta m.p.). Pada akhir 2023, terdapat sejumlah 24.88 juta m.p. ruang pejabat sedia ada daripada 2,601 bangunan, manakala 1.25 juta m.p. (40 bangunan) dalam penawaan akan datang dan hampir 0.95 juta m.p. (31 bangunan) dalam penawaran yang dirancang. WP Kuala Lumpur mendominasi ketiga-tiga kategori penawaran, menyumbang 41.1% daripada jumlah ruang pejabat sedia ada dan 57.3% daripada jumlah ruang penawaran akan datang.

Construction Activity

There were 13 new completions offering a total office space of nearly 0.40 million s.m. as compared to 2022 (10 new completions; 0.42 million s.m.). As at end- 2023, there was a total of 24.88 million s.m. existing office space from 2,601 buildings, while another 1.25 million s.m. (40 buildings) in the incoming supply and nearly 0.95 million s.m. (31 buildings) in the planned supply. WP Kuala Lumpur dominated all three categories of supplies, contributing 41.1% of the total existing office spaces and 57.3% of the total incoming supply spaces.

The following office buildings were completed in 2023:

State	Name of Building	Location	Category	Nett Lettable Area (s.m.)
Johor	Wisma Sunway Big Box	Medini Iskandar Puteri, Johor Bahru	Private Building	15,792
Perak	Menara Air Perak	Jalan Raja Ashman Shah (Jalan Hospital), Ipoh	Private Building	14,407
Negeri Sembilan	Kompleks Pentadbiran Pejabat Agama Islam Daerah Kuala Pilah	Pekan Kuala Pilah	Government Building	1,606
WP Kuala Lumpur	Corporate Tower@ Sunway Velocity 2	Jalan Peel/ Jalan Cheras, Kuala Lumpur	Private Building	29,185
	The Met Corporate Towers	Jalan Dutamas 2, Kuala Lumpur	Private Building	58,372
	Aspire Tower @ KL Eco City	Jalan Hj Abdullah Hukum, Kuala Lumpur	Private Building	38,850
	Merdeka 118 (Menara Warisan Merdeka)	Jalan Pudu, Kuala Lumpur	Private Building	150,962
	Ibu Pejabat Majlis Agama Islam Wilayah Persekutuan (MAIWP)	Jalan Raja Muda Abd Aziz, Kuala Lumpur	Government Building	18,957
	Pavilion Damansara Heights Corporate Towers	Jalan Damansara, Kuala Lumpur	Private Building	43,478
Sarawak	DCF @ Panggau Dayak Complex	Jalan Ong Tiang Swee, Kuching	Private Building	4,008
	DCCI @ Panggau Dayak Complex	Jalan Ong Tiang Swee, Kuching	Private Building	4,008
Sabah	Jabatan Audit Negara Negeri Sabah	Jalan Tuaran/ Jalan Pemajuan, Kota Kinabalu	Private Building	3,677
Total	13 buildings			398,735

Harga dan Sewa

Harga lot pejabat berstrata pada umumnya adalah stabil di seluruh negeri dengan beberapa pengecualian. Di WP Kuala Lumpur, harga ruang pejabat juga stabil, Phileo Promenade merekodkan peningkatan 18.5% dengan harga ditransaksikan pada RM5,800 s.m.p. hingga RM5,900 s.m.p. Bangsar South juga menyaksikan sedikit peningkatan 7.3% dengan harga dipindahmilik RM10,900 s.m.p. Bagaimanapun, Boulevard mengalami penurunan harga 17.7% kepada RM10,000 s.m.p. (2022: RM11,600 s.m.p.). Di Selangor, Dataran Sunway, Petaling dan Pusat

Price and Rental

Prices of stratified office lot was generally stable across the states with several exceptions. In WP Kuala Lumpur, prices for office space also recorded stable, Phileo Promenade recorded an increase of 18.5% with price transacted at RM5,800 p.s.m. to RM5,900 p.s.m. Bangsar South also saw a slight increase of 7.3% with price transacted at RM10,900 p.s.m. However, Boulevard experienced a price decrease of 17.7% to RM10,000 p.s.m. (2022: RM11,600 p.s.m.). In Selangor, Dataran Sunway, Petaling and Melawati Corporate Centre,

Korporat Melawati, Gombak juga mencatatkan sedikit peningkatan 4.1% dan 3.6% dengan harga masing-masing antara RM11,228 p.s.m. dan RM8,044 p.s.m. – RM8,383 p.s.m.

Gombak also registered a slight increase of 4.1% and 3.6% with price ranging at RM11,228 p.s.m. and RM8,044 p.s.m. – RM8,383 p.s.m. respectively.

Pasaran sewa ruang pejabat adalah stabil dengan pergerakan bercampur direkodkan dalam bangunan terpilih. Di Kuala Lumpur, ruang pejabat di Menara Perak, Menara UBN, Pusat UOA dan Menara Mara mengalami penurunan sewa masing-masing sebanyak 11.8%, 10.6%, 10.7% dan 11.6% dengan sewa antara RM41.00 p.s.m. kepada RM77.50 p.s.m. Sewa yang lebih tinggi dilihat di Menara Maxis antara RM91.60 p.s.m. hingga 138.96 p.s.m. Di Selangor, kebanyakan kadar sewa ruang pejabat kekal stabil dengan prestasi bercampur-campur ditunjukkan di beberapa bangunan pejabat. Ruang pejabat di Damansara Uptown 1 menyaksikan peningkatan kecil 2.1% hingga 5.0% dengan sewa bulanan antara RM48.00 s.m.p. hingga RM138.89 s.m.p. Begitu juga ruang pejabat di Aras 4, Kompleks MAIS Klang mengalami peningkatan ketara sebanyak 16.0% dengan sewa bulanan RM18.00 s.m.p. manakala Tingkat Bawah hingga 5, Crystal Plaza, Petaling Jaya disewakan pada kadar sewa bulanan RM49.51 s.m.p., turun 6.1%.

The office space rental market was stable with mixed movements recorded in selected buildings. In Kuala Lumpur, office space at Menara Perak, UBN Tower, UOA Centre and Menara Mara experienced a rental decrease of 11.8%, 10.6%, 10.7% and 11.6% respectively with rental ranging from RM41.00 p.s.m. to RM77.50 p.s.m. A higher rental was seen at Menara Maxis ranging between RM91.60 p.s.m. to 138.96 p.s.m. In Selangor, most office space rental rates remained stable with mixed performance showed in a few office buildings. Office space in Damansara Uptown 1 witnessed a marginal increase of 2.1% to 5.0% with monthly rental ranging from RM48.00 p.s.m. to RM138.89 p.s.m. Similarly, office space at Level 4, Kompleks MAIS Klang experienced a significant increase of 16.0% with monthly rental of RM18.00 p.s.m. whilst Ground to 5th Floor, Crystal Plaza, Petaling Jaya were tenanted at monthly rental of RM49.51 p.s.m., down by 6.1%.

2.2.5 Harta Tanah Riadah

2.2.5 Leisure Property

Transaksi

Transaction

Beberapa transaksi harta tanah riadah direkodkan dalam tempoh kajian dengan nilai terkumpul hampir RM450 juta. Empat mempunyai perjanjian jual beli bertariikh pada 2021 dan 2022 tetapi dimuktamadkan pada 2023.

Several leisure properties transactions were recorded in the review period with an accumulated worth of nearly RM450 million. Four had its sale and purchase agreements dated in 2021 and 2022 but concluded in 2023.

Among the major transactions are as listed below:

No	State	Property	Location	Transaction Year	Consideration (RM)
1	Pulau Pinang	Hotel Star Avenue	Jalan Perniagaan Star Avenue / Seberang Perai Selatan	2022	12,000,000
2	Negeri Sembilan	The Aston Hotel	Jalan Bandar Baru Nilai / Seremban	2022	11,300,000
3	Melaka	Terra Nova Hotel	Jalan Syed Abdul Aziz / Melaka Tengah	2022	8,000,000
4	Sarawak	Li Hua Hotel	Jalan Pulau Li Hua / Sibul	2021	19,000,000
5	WP Kuala Lumpur	Stripes Hotel	Jalan Dang Wangi / Kuala Lumpur	2023	138,000,000
6	Melaka	Sojourn Guest House	Jalan Ujong Pasir / Bandar Melaka	2023	11,000,000
7	Pahang	Chalet Endrong Resort	Persiaran Endrong / Bentong	2023	8,525,000
8	Sarawak	Arif Hotel	Jalan Haji Taha / Bahagian Kuching	2023	5,000,000
9	Sarawak	Regal Court Hotel	Jalan Tun Ahmad Zaidi Aduce / Bahagian Kuching	2023	10,000,000

The newly completed hotels/resorts in 2023 as follows:

State	Name of Hotels/Resorts	Number of Rooms
Pulau Pinang	Bertam Resort and Waterpark	293
	Marriot Residence	313
	The George	91
WP Kuala Lumpur	Mercure Hotel	235
	Imperial Lexis	439
Selangor	Avia Plus Hotel	111
	Holiday Inn Sepang	253
Terengganu	DJ Plaza Hotel and Suites	72
	The Payang Hotel	30
Sarawak	Sheraton Hotel	388
TOTAL	10 Hotels/ Resorts	2,225

Aktiviti Pembinaan

Aktiviti pembinaan berada pada tahap pemulihan apabila siap dibina dan penawaran baharu dirancang meningkat dengan ketara berbanding tahun sebelumnya. Terdapat 10 hotel baharu siap dibina pada tahun 2023 menawarkan 2,225 bilik, meningkat 65.9% berbanding 2022 daripada aspek bilangan bilik (2022: 10 hotel; 1,341 bilik). Penawaran baharu dirancang menunjukkan peningkatan lebih tiga kali ganda kepada 911 bilik (2022: 219 bilik) manakala mula dibina sebaliknya, menguncup 54.0% (690 bilik). Kebanyakan penawaran baharu dirancang adalah di WP Kuala Lumpur (2 hotel: 432 bilik), diikuti Perak (1 hotel: 301 bilik). Pada akhir 2023, terdapat 3,538 hotel/resort di seluruh negara yang menawarkan 275,119 bilik, 86 lagi hotel/resort (18,140 bilik) dalam penawaran akan datang dan 60 hotel/resort (12,894 bilik) di peringkat penawaran yang dirancang.

2.3 Harta Tanah Industri

Transaksi

Subsektor industri mencatat pertumbuhan sederhana pada tahun 2023, meningkat 0.9% dalam bilangan kepada 8,157 transaksi dan 13.1% dalam nilai kepada RM23.94 bilion (2022: 8,082 transaksi bernilai RM21.16 bilion); Selangor terus menguasai pasaran, dengan 31.8% daripada jumlah transaksi, diikuti oleh Johor, Sarawak dan Pulau Pinang dengan masing-masing menyumbang 19.3%, 7.9% dan 7.8% daripada syer pasaran.

Construction Activity

Construction activities was on a recovery tone as completion and new planned supply increased significantly compared to previous year. There were 10 new hotels completed in 2023 offering 2,225 rooms, up by 65.9% against 2022 in terms of rooms (2022: 10 hotels; 1,341 rooms). New planned supply showed an increase of more than threefold to 911 rooms (2022: 219 rooms) whilst starts on contrary contracted by 54.0% (690 rooms). Most new planned supply were in WP Kuala Lumpur (2 hotels: 432 rooms), followed by Perak (1 hotel: 301 rooms). As at end-2023, there were 3,538 hotels/resorts across the country offering 275,119 rooms, another 86 hotels/resorts (18,140 rooms) were in the incoming supply and 60 hotels/resorts (12,894 rooms) at the planned supply stage.

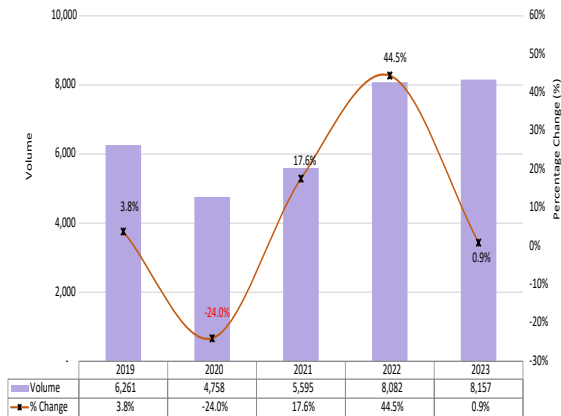
2.3 Industrial Property

Transaction

The industrial sub-sector recorded moderate growth in 2023, increased by 0.9% in volume to 8,157 transactions and 13.1% in value to RM23.94 billion (2022: 8,082 transactions worth RM21.16 billion); Selangor continued to dominate the market, with 31.8% of total transactions volume, followed by Johor, Sarawak and Pulau Pinang with 19.3%, 7.9% and 7.8% of market share respectively.

Chart 25

Industrial Transactions Volume 2019 - 2023



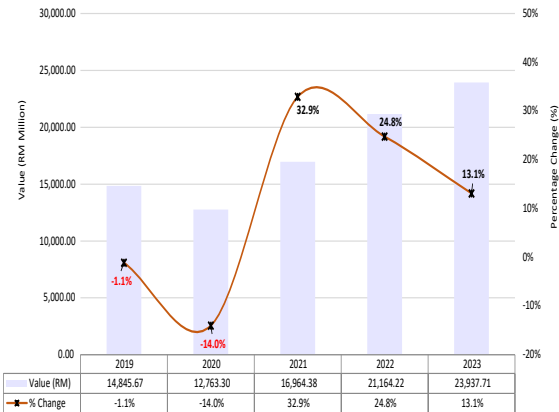
Status Pasaran

Keadaan industri siap dibina tidak terjual terus bertambah baik pada tahun 2023. Bilangan unit siap dibina tidak terjual menurun kepada 808 unit bernilai RM0.84 bilion, menunjukkan penurunan masing-masing sebanyak 8.2% dan 26.8% dalam bilangan dan nilai (2022: 880 unit siap dibina tidak terjual bernilai hampir RM1.15 bilion). Pada catatan yang sama, unit belum dibina belum terjual berkurang kepada 22 unit, turun 56.9%. Unit dalam pembinaan belum terjual merekodkan 457 unit, melebihi 450 unit yang direkodkan pada tahun 2022.

Sarawak memegang sebahagian besar unit siap dibina tidak terjual, dengan 40.0% syer, diikuti oleh Johor (21.4%) dan Perak (9.7%). Mengikut jenis, kilang teres dan berkembar merupakan sebahagian besar daripada kilang tidak terjual, masing-masing menyumbang 61.1% dan 31.3% syer. Kebanyakan unit siap dibina tidak terjual adalah unit teres dalam lingkungan harga RM500,001 hingga RM1.0 juta (50.4% syer) manakala bagi unit berkembar melebihi RM1 juta, membentuk 20.8% daripada jumlah keseluruhan negara.

Chart 26

Industrial Transaction Value Trend 2019 - 2023



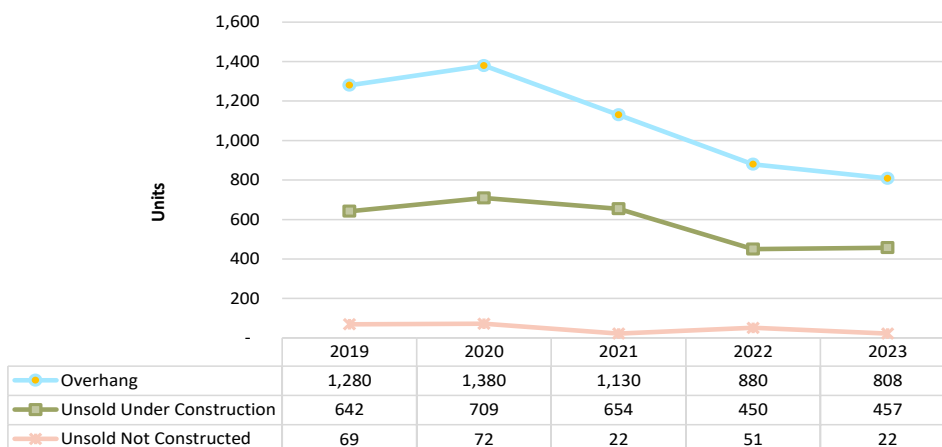
Market Status

The industrial overhang situation continued to improve in 2023. The overhang volume decreased to 808 overhang units worth RM0.84 bilion, indicating a decline of 8.2% and 26.8% in volume and value respectively (2022: 880 overhang units worth nearly RM1.15 bilion). On similar note, the unsold not constructed decreased to 22 units, down by 56.9%. The unsold under construction recorded 457 units, more than 450 units recorded in 2022.

Sarawak held most of the overhang, with 40.0% share, followed by Johor (21.4%) and Perak (9.7%). By type, terraced and semi-detached factories formed the bulk of the overhang, each contributed 61.1% and 31.3% share. Most of the overhang for terraced units were in the priced brackets RM500,001 to RM1.0 million (24.1% share) while for semi-detached units were above RM1 million, forming 20.8% of the national total.

Chart 27

Industrial Market Status 2019 - 2023



Aktiviti Pembinaan

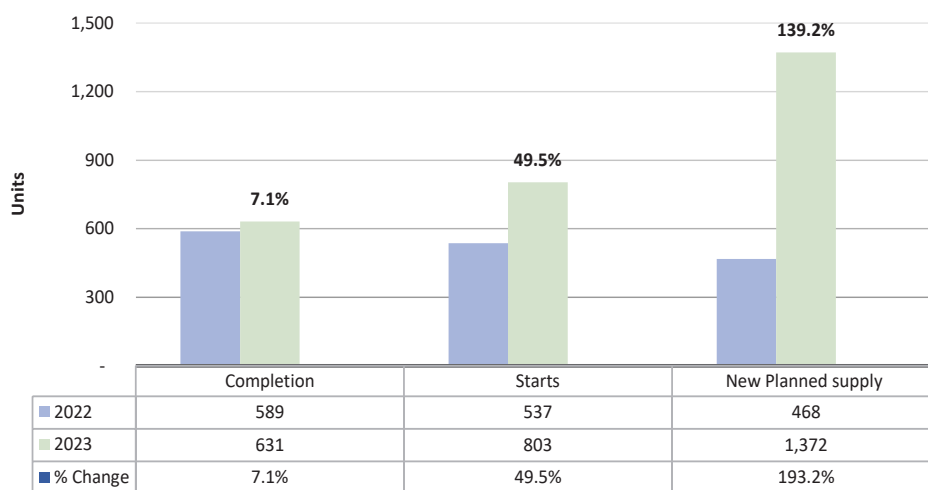
Dari segi pembinaan, subsektor industri menunjukkan pertumbuhan yang kukuh. Unit siap dibina dan mula dibina masing-masing meningkat 7.1% kepada 631 unit dan 49.5% kepada 803 unit, manakala penawaran baharu dirancang meningkat hampir dua kali ganda kepada 1,372 unit. Johor menyumbang bilangan unit siap dibina tertinggi iaitu 56.4% daripada jumlah nasional dan diikuti oleh Selangor (21.2%). Pada akhir 2023, terdapat lebih daripada 121,000 unit industri sedia ada, lebih daripada 4,000 unit dalam penawaran akan datang dan hampir 7,000 unit dalam penawaran yang dirancang.

Construction Activity

On the construction front, the industrial sub-sector saw a strong growth. Completions and starts increased by 7.1% to 631 units and 49.5% to 803 units respectively whilst the new planned supply increased nearly two-fold to 1,372 units. Johor contributed the highest number of completions accounting for 56.4% of the national total and followed by Selangor (21.2%). As at end-2023, there were slightly more than 121,000 existing industrial units, more than 4,000 units in the incoming supply and nearly 7,000 units in the planned supply.

Chart 28

Industrial Construction Activity



Harga

Harta Tanah industri menunjukkan peningkatan di seluruh negeri dengan beberapa kenaikan yang disaksikan untuk kilang teres. Trend menaik boleh dikaitkan dengan permintaan gudang dan storan yang semakin meningkat berikutan pengembangan e-dagang. Harga harta tanah industri di WP Kuala Lumpur dan Selangor menunjukkan trend yang lebih stabil. Di WP Kuala Lumpur, kilang teres satu setengah tingkat di Kepong Entrepreneurs Park, Springcrest Industrial Park dan Desa Tun Razak 2 masing-masing meningkat 17.6%, 15.2% dan 10.8% dengan harga transaksi antara RM1.18 juta hingga RM1.6 juta. Di Selangor, jenis kilang teres yang sama di Sunway Damansara dan Taman Perindustrian Subang Mewah, di Petaling masing-masing meningkat 7.0% dan 7.8% kepada RM1.28 juta hingga RM1.3 juta dan RM1.98 juta. Begitu juga, di Pulau Pinang jenis harta tanah yang serupa di Lembah Diomond juga mencatatkan pergerakan menaik sebanyak 11.5% dipindahmilik pada harga yang lebih tinggi antara RM2.2 juta hingga RM2.33 juta.

Price

The industrial property shown an improvement across the states with some increment witnessed for terraced factory. The upward trend could be attributed to growing demand for warehouse and storage due to expansion of e-commerce. Prices of industrial property in WP Kuala Lumpur and Selangor showed a more stable trend. In WP Kuala Lumpur, one and a-half storey terraced factory at Kepong Entrepreneurs Park, Springcrest Industrial Park and Desa Tun Razak 2 increased by 17.6%, 15.2% and 10.8% respectively with price transacted ranging from RM1.18 million to RM1.6 million. In Selangor, similar terraced factory in Sunway Damansara and Taman Perindustrian Subang Mewah, in Petaling increased by 7.0% and 7.8% to RM1.28 million to RM1.3 million and RM1.98 million respectively. Likewise, in Pulau Pinang similar type in Diomond Valley also recorded upward movements by 11.5% transacted at higher price ranging from RM2.2 million to RM2.33 million.

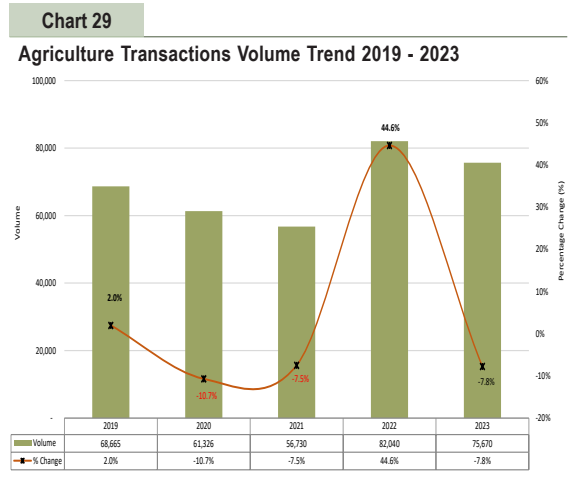
2.4 Harta Tanah Pertanian

Transaksi

Subsektor pertanian merekodkan 75,670 transaksi bernilai RM18.67 bilion, susut sebanyak 7.8% dalam bilangan manakala nilai sebaliknya, menunjukkan peningkatan sedikit 4.6% berbanding 2022 (82,040 transaksi bernilai RM17.86 bilion). Subsektor ini dikedudukan kedua daripada segi sumbangan kepada bilangan pasaran keseluruhan dengan syer 19.0%. Namun begitu, sumbangan kepada nilai transaksi hanya 9.5% daripada jumlah nasional.

Secara amnya, prestasi transaksi mengikut negeri adalah bercampur-campur. Kedah dan Perak menyumbang syer pasaran lebih tinggi kepada jumlah nasional, masing-masing dengan 17.6% (13,297 transaksi) dan 17.0% (12,871 transaksi). Daripada segi nilai, Johor mendahului pasaran dengan 33.9%, diikuti Perak (11.5%).

Tempoh kajian merekodkan 52 transaksi tanah ladang bernilai RM1.52 bilion. Dua puluh enam di Sabah, enam di Perak, masing-masing empat di Negeri Sembilan, Sarawak dan Kedah, tiga di Pahang dan Melaka dan masing-masing satu di Johor dan Terengganu. Daripada 52 transaksi, 30 tanah ladang dimuktamadkan pada tahun 2023, 21 tanah ladang telah dijual pada tahun 2022 dan satu lagi tanah ladang telah dijual pada tahun 2021.



Harga

Harga tanah pertanian secara umumnya adalah stabil. Di Johor, tanah kelapa sawit merekodkan pergerakan positif kebanyakannya di Muar dan Tangkak, meningkat 2.6% hingga 9.3% dengan harga antara RM98,000 hingga RM481,000 sehektar. Begitu juga, tanah durian pedalaman menyaksikan trend aliran menaik sebanyak 3.7% dan 7.0% di Tangkak, Johor dipindahmilik antara RM502,000 hingga RM692,000 sehektar. Di Selangor, tanah padi pedalaman di Kuala Selangor meningkat

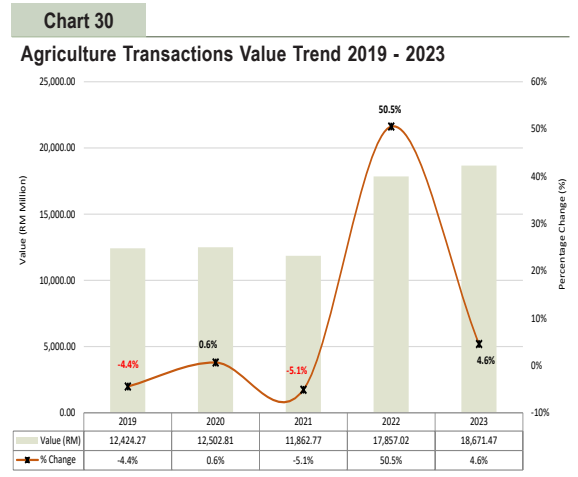
2.4 Agriculture Property

Transaction

Agriculture sub-sector recorded 75,670 transactions worth RM18.67 billion, declined by 7.8% in volume whilst value contrarily, saw a slight increase of 4.6% against 2022 (82,040 transactions worth RM17.86 billion). The sub-sector ranked second in terms of contribution to the overall market volume with 19.0% share. Nevertheless, contribution to the transaction value only 9.5% from national total.

Generally, transaction performance by states was mixed. Kedah and Perak contributed higher market share to the national total, each with 17.6% (13,297 transactions) and 17.0% (12,871 transactions) share. In terms of value, Johor led the market with 33.9%, followed by Perak (11.5%).

The review period recorded 52 estate land transactions worth RM1.52 billion. Twenty-six in Sabah, six in Perak, four each in Negeri Sembilan, Sarawak and Kedah, three each in Pahang and Melaka and one each in Johor and Terengganu. Out of 52 transactions, 30 estate lands concluded in 2023, 21 estate lands were sold in 2022 and another one estate land was sold in 2021.



Price

Prices of agriculture land were generally stable. In Johor, oil palm lands recorded a positive movement mostly in Muar and Tangkak, increased by 2.6% to 9.3% with prices ranging RM98,000 to RM481,000 per hectare. Likewise, interior durian lands witnessed upward trend of 3.7% and 7.0% in Tangkak, Johor transacted between RM502,000 and RM692,000 per hectare. In Selangor, interior paddy lands in Kuala Selangor increased by 7.6% and 9.9% with prices transacted ranging from

7.6% dan 9.9% dengan harga dipindahmilik antara RM240,000 hingga RM317,000 sehektar. Begitu juga di Kedah, tanah pedalaman padi dua kali tanaman di Kubang Pasu ditransaksikan antara RM134,000 hingga RM208,000 sehektar, manakala tanah padi hadapan jalan dipindahmilik pada RM326,000 sehektar. Di Daerah Kota Bharu, jenis tanah yang sama dipindahmilik antara RM174,000 dan RM423,000 sehektar.

3.0 PROSPEK 2024

Menurut Kementerian Kewangan (MoF), ekonomi Malaysia dijangka berkembang sederhana dengan unjuran pertumbuhan antara 4% hingga 5% pada 2024, didorong oleh permintaan domestik, struktur ekonomi yang mampan dan pelbagai serta ditambah dengan sokongan dasar berterusan termasuk Pelan Hala Tuju Peralihan Tenaga Negara dan Pelan Induk Perindustrian Baharu 2030. Bank Negara Malaysia (BNM) juga menjangkakan perbelanjaan domestik yang berdaya tahan dan peningkatan permintaan luaran akan memacu pertumbuhan Malaysia.

Pasaran harta tanah dijangka meneruskan momentumnya disokong oleh pelbagai inisiatif yang digariskan oleh kerajaan di bawah Bajet 2024, antara lain:

- i. Membuka kawasan perindustrian berteknologi tinggi di Kerian, Perak Utara, bagi membina ekosistem lebih luas untuk kluster E & E di Wilayah Utara.
- ii. Selaras dengan Pelan Induk Industri Halal 2030, yang menetapkan penanda aras bagi sumbangan industri halal sebanyak 11% daripada KDNK menjelang 2030, 9 institusi kewangan menawarkan program khas untuk PKS halal di bawah platform bersepadu halal yang menawarkan akses dana khas dan program bina upaya.
- iii. Dana jaminan khas sebanyak RM1 bilion diperuntukkan untuk menggalakkan pemaju berwibawa untuk memulihkan projek terbengkalai.
- iv. Peruntukan RM546 juta bagi meneruskan pelaksanaan 36 Program Perumahan Rakyat (PPR), termasuk projek baharu di Kluang, Johor dan 15 lagi projek PPR dijangka akan siap serta akan memberi manfaat kepada 5,100 bakal penduduk baharu.
- v. Peruntukan RM358 juta akan disalurkan untuk meneruskan pembinaan 3,500 unit rumah di bawah 14 Program Rumah Mesra Rakyat.
- vi. Menyediakan jaminan sehingga RM10 bilion di bawah Skim Jaminan Kredit Perumahan (SJKP) yang akan memberi manfaat kepada 40,000 peminjam.
- vii. Mengenakan duti setem dengan kadar rata 4% ke atas transaksi dokumen pemilikan tanah oleh bukan warganegara dan syarikat milik asing, kecuali individu berstatus pemastautin tetap di Malaysia.
- viii. Melonggarkan syarat program Malaysia My Second Home (MM2H) bagi menarik lebih ramai pelancong dan pelabur asing ke dalam negara.

RM240,000 to RM317,000 per hectare. Similarly, in Kedah interior double-cropping paddy lands in Kubang Pasu were transacted between RM134,000 and RM208,000 per hectare, whilst the road frontage paddy lands were transacted at RM326,000 per hectare. In Kota Bharu District, similar land was transacted between RM174,000 and RM423,000 per hectare.

3.0 2024 OUTLOOK

According to the Ministry of Finance (MoF), Malaysia's economy is expected to grow moderately with the projected growth between 4% to 5% in 2024, driven by domestic demand, sustained and diversified economic structure and coupled with ongoing policy support including the National Energy Transition Roadmap and the New Industrial Master Plan 2030. Bank Negara Malaysia (BNM) also anticipated resilient domestic expenditure and improvement in external demand will driven Malaysia's growth.

The property market is expected to continue its momentum supported by various initiatives outlined by the government under Budget 2024, among others:

- i. Establish a high-tech industrial area in Kerian, Northern Perak to widen the E & E cluster ecosystem in the Northern Region.*
- ii. In line with the Halal Industry Master Plan 2030, which sets a benchmark for the halal industry's contribution of 11% of GDP by 2030, 9 financial institutions are offering special programmes for halal SMEs in halal industry an integrated platform providing access to special funds and capacity building programmes.*
- iii. A special guarantee fund of RM1 billion has been allocated to encourage reputable developers to revive identified abandoned projects.*
- iv. Allocation of RM546 million to continue the implementation of 36 Program Perumahan Rakyat (PPR), including a new project in Kluang, Johor and another 15 PPR projects are expected to be completed and this is expected to benefit 5,100 potential new residents.*
- v. Allocation of RM358 million will be channelled to continue for the construction of 3,500 housing units under 14 Program Rumah Mesra Rakyat.*
- vi. Provide guarantees of up to RM10 billion under Skim Jaminan Kredit Perumahan (SJKP) which will benefit to 40,000 borrowers.*
- vii. Imposing a flat rate stamp duty of 4% on the transfer of land ownership documents by non-citizens and foreign-owned companies, except for individuals with permanent residency status in Malaysia.*
- viii. Ease the requirements of Malaysia My Second Home (MM2H) programme to attract more tourists and foreign investors to Malaysia.*

Dari segi pembangunan infrastruktur, kerajaan telah mencadangkan peruntukan bagi beberapa projek yang sedang dijalankan dan projek baharu di bawah Bajet 2024 yang dijangka dapat memacu aktiviti ekonomi, antara lain:

- i. Lebuhraya Pan Borneo Sabah Fasa 1B dengan anggaran jarak melebihi 366km.
- ii. Menyegerakan Projek Sarawak - Sabah Link Road (SSLR) Fasa 2, menjangkau lebih 320 kilometer.
- iii. Melebar dan menaik taraf Lebuhraya Utara Selatan (PLUS) daripada empat lorong kepada enam lorong dari Sedenak ke Simpang Renggam.
- iv. Meneruskan semula cadangan pembinaan lima stesen LRT3 iaitu Tropicana, Raja Muda, Temasya, Bukit Raja dan Bandar Botanik.
- v. Memperluas program Transformasi Perkhidmatan Bas Berhenti (SBST) kepada lokasi tambahan iaitu Kota Bharu, Kuantan dan Kota Setar.
- vi. Menaik taraf, membina dan menyelenggara Jalan Ladang Pekebun Kecil (JLPK) persendirian seluruh Malaysia bagi memudahkan penghantaran input pertanian dan pengeluaran hasil komoditi.

Pembangunan infrastruktur lain yang dijangka merencanakan aktiviti ekonomi termasuk Laluan Rel Pantai Timur (ECRL), yang dijadualkan beroperasi pada Januari 2027. Landasan ECRL dari Kota Bharu, Kelantan, ke Pelabuhan Klang, Selangor, akan meningkatkan lagi potensi kawasan spot baharu di sepanjang laluan dan mewujudkan lembaran baharu dalam sistem pengangkutan negara.

Peluasan sektor e-dagang dan pelbagai inisiatif yang digariskan oleh kerajaan di bawah bajet 2024 seperti Pelan Induk Perindustrian Baharu 2030 dan Pelan Induk Industri Halal 2030 dijangka menggalakkan prestasi pasaran harta tanah industri. Memandangkan ekonomi negara diunjurkan kekal dalam julat 4.0% hingga 5.0% pada 2024 yang disokong oleh prospek pertumbuhan domestik yang berdaya tahan, prestasi pasaran harta tanah dijangka kekal optimistik dengan berhati-hati memandangkan persekitaran luaran yang tidak dapat diramalkan. Dasar akomodatif, sokongan berterusan kerajaan, pelaksanaan semua langkah perancangan yang digariskan dalam Bajet 2024 dan pelaksanaan strategi dan inisiatif terbaik di bawah RMK-12 dijangka akan terus menyokong pertumbuhan dalam sektor harta tanah.

On the infrastructure development front, the government has proposed allocations on several ongoing and new projects under the revised Budget 2024 which are expected to spur the economic activities, among others:

- i. The Sabah Pan Borneo Highway Phase 1B, covering over 366km.*
- ii. Accelerate Sarawak-Sabah Link Road (SSLR) Phase 2 project, spanning over 320 kilometres.*
- iii. Extend and upgrade North-South Expressway (PLUS) from four to six lanes from Sedenak to Simpang Renggam.*
- iv. Resume the previous proposal to construct five LRT3 stations namely Tropicana, Raja Muda, Temasya, Bukit Raja and Bandar Botanik.*
- v. Expand Stage Bus Service Transformation (SBST), to additional locations, namely Kota Bharu, Kuantan, and Kota Setar.*
- vi. Upgrade, construct, and maintain roads in smallholder plantations (JLPK) nationwide to facilitate transportation of agricultural inputs and commodity products.*

Another infrastructure development which are expected to boost economic activities includes the East Coast Rail Link (ECRL), which is scheduled to be operational in January 2027. The ECRL track from Kota Bharu, Kelantan, to Port Klang, Selangor, will further boost the potential new spots area along the route and creating a new chapter in the country's transportation system.

The expansion of the e-commerce sector and various initiatives outlined by the government under 2024 budget such as New Industrial Master Plan 2030 and the Pelan Induk Industri Halal 2030 are expected to promote the performance of industrial property market. As the national economy is projected to remain in the range of 4.0% to 5.0% in 2024 which supported by resilient domestic growth prospects, the property market performance is expected to remain cautiously optimistic given the unpredictable external environment. The accommodative policies, continuous government support, well-executed measures outlined in Budget 2024, and the proper implementation of strategies and initiatives under RMK-12 are expected to continue supporting growth in the property sector.

JADUAL GAMBARAN KESELURUHAN
OVERVIEW TABLE

Pendapatan Negara dan Pengeluaran Dalam Negeri	2021		2022 ^a		2023 ^a		National Income and Domestic Product
	RM Juta/ RM Billion	% Pertumbuhan Growth					
Jumlah Penduduk ('000)	32.59	0.2	33.4	2.5	32.7	2.1	Total Population ('000)
Keluaran Dalam Negara Kasar (KDNK) (pada harga malar 2015)	1,386.7	3.1	1,507.3	8.7	1,566.5	3.7	Gross Domestic Product (GDP) (2015 constant prices)
Sektor Utama yang menyumbang kepada KDNK							Key Sectors Contributing to GDP
• Pertanian	99.0	-0.1	99.1	0.1	99.8	0.7	• Agricultural
• Perlombongan dan kuari	93.7	0.9	96.2	2.6	97.2	1.0	• Mining and quarrying
• Pembuatan	336.8	9.5	364.1	8.1	366.7	0.7	• Manufacturing
• Pembinaan	50.9	-5.1	53.4	5.0	56.7	6.1	• Construction
• Perkhidmatan	794.6	2.2	881.3	10.9	927.8	5.3	• Services
- Utiliti (Elektrik, gas)	30.2	2.0	31.3	3.6	32.1	2.4	- Utilities
- Pengangkutan dan penyimpanan	42.7	1.4	55.8	30.8	63.5	13.8	- Transport and storage
- Maklumat dan komunikasi	94.6	6.1	99.6	5.2	103.1	3.6	- Wholesale, and retail trade
- Perdagangan borong dan runcit	213.0	3.3	236.4	11.0	249.4	5.5	- Wholesale, and retail trade
- Penginapan	3.7	-24.6	8.3	125.1	10.7	29.2	- Accommodation
- Kewangan dan insurans	105.8	11.0	106.7	-0.7	104.5	-3.5	- Finance and insurance
- Harta tanah dan perkhidmatan perniagaan	53.1	-10.6	65.1	24.4	70.9	7.5	- Real estate and business services
- Perkhidmatan kerajaan	131.5	5.4	138.0	5.0	145.6	5.5	- Government services
- Perkhidmatan-perkhidmatan lain	41.1	-5.3	45.2	10.1	47.5	5.1	- Other services
Pendapatan Negara Kasar (KNK) (pada harga semasa)	1,506.7	8.4	1,731.9	14.9	1767.6	2.1	Gross National Income (GNI) (at current prices)
Pendapatan Negara Kasar (KNK) (pada harga tetap 2015)	1,369.8	2.8	1,478.4	7.9	1539.4	4.1	Gross National Income (GNI) (2015 constant prices)
Guna Tenaga dan Buruh	15.80	0.8	16.73	5.9	n.a	n.a	Employment and Labour
Tenaga buruh (ribu)							Labour force (thousand)
Penduduk bekerja (ribu)	15.06	0.7	16.13	7.1	n.a	n.a	Employment (thousand)
Kadar pengangguran (%)	4.6		3.8		n.a		Unemployment rate (%)
Indeks Harga Pengguna	123.1		127.2		130.4		Consumer Price Index
Kadar Inflasi (% perubahan)	2.5		3.4		2.5		Inflation Rates (% Change)
^a Data Awal (Preliminary)							Sumber: Unit Perancang Ekonomi Jabatan Perangkaan Malaysia Kementerian Sumber Manusia Malaysia Source: Economic Planning Unit Department of Statistics, Malaysia Ministry of Human Resource, Malaysia

Jadual II/ Table II
Bilangan Transaksi Harta Tanah Mengikut Subsektor dan Lingkungan Harga
Number of Property Transactions by Sub-Sector and Price

JABATAN PENILAIAN &
 PERKHIDMATAN HARTA

Time Period & Price Range	Residential		Commercial		Industrial		Agriculture		Development Land		Others		Total	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Jan - Jun														
100,000 & Below	19,865	19,178	1,432	1,281	292	328	24,596	22,113	5,313	5,492	1	1	51,499	48,393
100,001 - 200,000	23,433	21,546	1,674	1,773	322	255	7,684	6,626	2,033	2,034	0	2	35,146	32,236
200,001 - 300,000	21,952	21,335	1,717	1,806	296	217	3,301	2,843	990	897	1	0	28,257	27,098
300,001 - 400,000	16,169	16,375	1,715	1,784	228	191	1,849	1,458	538	573	0	0	20,499	20,381
400,001 - 500,000	11,311	12,188	1,635	1,969	213	183	1,210	923	382	390	0	1	14,751	15,654
500,001 - 600,000	6,554	6,844	1,193	1,635	185	171	685	607	261	295	0	0	8,878	9,552
600,001 - 700,000	4,517	5,078	1,237	1,469	170	174	494	422	195	201	1	0	6,614	7,344
700,001 - 800,000	3,130	3,255	802	1,056	141	147	421	296	199	160	0	0	4,693	4,914
800,001 - 900,000	2,164	2,111	594	835	112	135	276	194	142	152	1	0	3,289	3,427
900,001 - 1,000,000	1,376	1,452	490	660	147	94	203	172	133	130	0	0	2,349	2,508
1,000,001 & Above	5,707	5,611	2,679	3,334	1,724	1,840	876	793	1,035	1,049	6	6	12,027	12,633
Total	116,178	114,973	15,168	17,602	3,830	3,735	41,595	36,447	11,221	11,373	10	10	188,002	184,140
Jan - Sept														
100,000 & Below	30,312	29,372	2,022	2,118	487	481	37,632	33,878	8,586	8,488	1	2	79,040	74,339
100,001 - 200,000	36,356	34,093	2,566	2,734	503	430	11,842	10,277	3,041	3,118	1	3	54,309	50,655
200,001 - 300,000	34,444	34,534	2,677	3,036	432	347	5,076	4,433	1,458	1,486	2	0	44,089	43,836
300,001 - 400,000	25,497	25,907	2,718	2,983	373	305	3,547	2,398	848	898	0	0	32,983	32,491
400,001 - 500,000	17,956	19,602	2,514	3,205	386	294	1,836	1,573	582	678	2	1	23,276	25,353
500,001 - 600,000	10,313	11,103	2,071	2,702	318	267	1,078	985	373	436	1	0	14,154	15,493
600,001 - 700,000	7,271	8,228	1,949	2,431	261	269	797	731	309	331	1	0	10,588	11,990
700,001 - 800,000	4,826	5,455	1,274	1,804	229	235	622	482	290	277	0	0	7,241	8,253
800,001 - 900,000	3,246	3,491	933	1,435	186	214	432	320	224	256	1	1	5,022	5,717
900,001 - 1,000,000	2,178	2,388	791	999	211	158	295	291	208	199	0	0	3,683	4,035
1,000,001 & Above	8,692	9,352	4,214	5,563	2,658	2,934	1,433	1,267	1,725	1,783	8	12	18,730	20,911
Total	181,091	183,525	23,729	29,010	6,044	5,934	64,590	56,635	17,644	17,950	17	19	293,115	293,073
Jan - Dec														
100,000 & Below	40,935	38,183	2,679	2,906	656	626	47,669	44,716	11,112	11,352	2	3	103,053	97,786
100,001 - 200,000	48,523	46,487	3,411	3,605	687	567	15,208	13,918	3,881	4,103	1	5	71,711	68,685
200,001 - 300,000	46,158	47,683	3,725	4,172	524	450	6,419	6,014	1,907	1,959	2	0	58,735	60,278
300,001 - 400,000	34,190	35,576	3,789	4,181	479	399	4,352	3,315	1,106	1,242	0	0	43,916	44,713
400,001 - 500,000	24,674	26,825	3,573	4,428	534	451	2,351	2,141	738	888	2	2	31,872	34,735
500,001 - 600,000	14,012	15,450	2,910	3,874	418	380	1,372	1,364	531	599	1	0	19,244	21,667
600,001 - 700,000	9,763	11,456	2,666	3,441	335	351	1,012	1,024	429	461	1	0	14,206	16,733
700,001 - 800,000	6,441	7,720	1,762	2,552	299	315	788	655	371	375	0	0	9,661	11,617
800,001 - 900,000	4,284	5,035	1,366	2,016	252	295	560	432	298	352	1	1	6,761	8,131
900,001 - 1,000,000	2,858	3,321	1,103	1,429	274	261	416	401	264	281	0	0	4,915	5,693
1,000,001 & Above	11,352	12,850	5,825	7,859	3,624	4,062	1,893	1,690	2,327	2,493	12	16	25,033	28,970
Total	243,190	250,586	32,809	40,463	8,082	8,157	82,040	75,670	22,964	24,105	22	27	389,107	399,008

Jadual IV / Table IV
Bilangan Transaksi Harta Tanah Mengikut Negeri dan Tempoh Masa
Number of Property Transactions by State and Time Period

Time Period	Residential		Commercial		Industrial		Agriculture		Development Land		Others		Total	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
W.P. Kuala Lumpur														
Jan - Mar	3,127	2,863	1,054	1,122	34	32	0	0	51	31	1	0	4,267	4,048
Apr - June	3,180	3,034	1,144	1,234	45	33	0	0	35	45	0	1	4,404	4,347
Jul - Sept	3,514	4,041	1,303	1,949	31	46	0	0	65	54	0	1	4,913	6,091
Oct - Dec	3,361	3,814	1,276	1,948	39	40	0	0	52	56	0	0	4,728	5,858
Jan - June	6,307	5,897	2,198	2,356	79	65	0	0	86	76	1	1	8,671	8,395
Jan - Sept	9,821	9,938	3,501	4,305	110	111	0	0	151	130	1	2	13,584	14,486
Jan - Dec	13,182	13,752	4,777	6,253	149	151	0	0	203	186	1	2	18,312	20,344
W.P. Putrajaya														
Jan - Mar	62	68	8	8	0	0	0	0	0	0	0	0	70	76
Apr - June	115	58	6	6	1	0	0	0	0	0	0	0	122	64
Jul - Sept	66	118	5	22	0	1	0	0	0	0	0	0	71	141
Oct - Dec	96	86	12	13	0	8	0	0	0	0	0	0	108	107
Jan - June	177	126	14	14	1	0	0	0	0	0	0	0	192	140
Jan - Sept	243	244	19	36	1	1	0	0	0	0	0	0	263	281
Jan - Dec	339	330	31	49	1	9	0	0	0	0	0	0	371	388
W.P. Labuan														
Jan - Mar	87	72	6	11	1	3	31	33	55	41	0	0	180	160
Apr - June	70	44	4	3	4	2	16	12	40	36	0	0	134	97
Jul - Sept	72	79	9	6	5	5	19	23	40	34	0	1	145	148
Oct - Dec	44	53	12	9	9	5	28	22	47	37	0	0	140	126
Jan - June	157	116	10	14	5	5	47	45	95	77	0	0	314	257
Jan - Sept	229	195	19	20	10	10	66	68	135	111	0	1	459	405
Jan - Dec	273	248	31	29	19	15	94	90	182	148	0	1	599	531
Selangor														
Jan - Mar	13,758	12,397	1,970	2,139	564	547	1,027	993	653	634	3	1	17,975	16,711
Apr - June	13,743	13,077	2,055	2,451	655	616	1,003	844	595	552	0	0	18,051	17,540
Jul - Sept	15,515	14,761	2,285	2,770	801	758	1,158	1,218	1,142	657	0	1	20,901	20,165
Oct - Dec	13,498	14,800	2,344	2,750	711	669	1,008	1,288	646	703	1	0	18,208	20,210
Jan - June	27,501	25,474	4,025	4,590	1,219	1,163	2,030	1,837	1,248	1,186	3	1	36,026	34,251
Jan - Sept	43,016	40,235	6,310	7,360	2,020	1,921	3,188	3,055	2,390	1,843	3	2	56,927	54,416
Jan - Dec	56,514	55,035	8,654	10,110	2,731	2,590	4,196	4,343	3,036	2,546	4	2	75,135	74,626
Johor														
Jan - Mar	6,054	7,497	1,150	1,318	303	304	2,611	2,388	541	591	0	1	10,659	12,099
Apr - June	6,782	10,465	1,133	1,820	226	380	2,747	2,185	601	524	0	0	11,489	15,374
Jul - Sept	7,551	11,832	1,122	2,537	290	448	2,752	2,478	603	651	2	1	12,320	17,947
Oct - Dec	7,700	10,767	1,382	2,366	311	441	2,356	3,012	568	805	0	0	12,317	17,391
Jan - June	12,836	17,962	2,283	3,138	529	684	5,358	4,573	1,142	1,115	0	1	22,148	27,473
Jan - Sept	20,387	29,794	3,405	5,675	819	1,132	8,110	7,051	1,745	1,766	2	2	34,468	45,420
Jan - Dec	28,087	40,561	4,787	8,041	1,130	1,573	10,466	10,063	2,313	2,571	2	2	46,785	62,811
Pulau Pinang														
Jan - Mar	4,035	3,975	318	958	110	142	449	387	316	279	0	1	5,228	5,742
Apr - June	4,323	4,195	498	442	163	160	375	383	311	363	0	0	5,670	5,543
Jul - Sept	4,876	5,153	481	566	126	145	560	432	351	370	1	1	6,395	6,667
Oct - Dec	4,658	5,340	676	556	123	186	395	328	335	321	1	0	6,188	6,731
Jan - June	8,358	8,170	816	1,400	273	302	824	770	627	642	0	1	10,898	11,285
Jan - Sept	13,234	13,323	1,297	1,966	399	447	1,384	1,202	978	1,012	1	2	17,293	17,952
Jan - Dec	17,892	18,663	1,973	2,522	522	633	1,779	1,530	1,313	1,333	2	2	23,481	24,683

Jadual IV / Table IV
Bilangan Transaksi Harta Tanah Mengikut Negeri dan Tempoh Masa
Number of Property Transactions by State and Time Period

JABATAN PENILAIAN &
 PERKHIDMATAN HARTA

Time Period	Residential		Commercial		Industrial		Agriculture		Development Land		Others		Total	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Perak														
Jan - Mar	6,949	6,118	639	650	140	111	3,480	3,259	181	219	0	0	11,389	10,357
Apr - June	7,550	6,353	610	584	206	163	3,322	3,086	97	108	0	1	11,785	10,295
Jul - Sept	8,129	7,486	739	667	157	106	4,029	3,403	153	125	0	0	13,207	11,787
Oct - Dec	7,458	7,862	745	751	151	156	3,042	3,123	88	136	2	1	11,486	12,029
Jan - June	14,499	12,471	1,249	1,234	346	274	6,802	6,345	278	327	0	1	23,174	20,652
Jan - Sept	22,628	19,957	1,988	1,901	503	380	10,831	9,748	431	452	0	1	36,381	32,439
Jan - Dec	30,086	27,819	2,733	2,652	654	536	13,873	12,871	519	588	2	2	47,867	44,468
Negeri Sembilan														
Jan - Mar	3,634	3,393	332	292	179	131	1,091	940	122	120	1	0	5,359	4,876
Apr - June	3,671	4,978	328	418	123	174	1,018	980	145	136	1	0	5,286	6,686
Jul - Sept	3,800	4,004	298	387	113	86	1,269	1,066	184	203	1	1	5,665	5,747
Oct - Dec	5,681	4,734	311	489	114	101	988	1,052	127	162	0	0	7,221	6,538
Jan - June	7,305	8,371	660	710	302	305	2,109	1,920	267	256	2	0	10,645	11,562
Jan - Sept	11,105	12,375	958	1,097	415	391	3,378	2,986	451	459	3	1	16,310	17,309
Jan - Dec	16,786	17,109	1,269	1,586	529	492	4,366	4,038	578	621	3	1	23,531	23,847
Melaka														
Jan - Mar	2,136	2,319	265	258	100	88	502	337	700	847	0	1	3,703	3,850
Apr - June	2,450	2,244	276	321	97	86	538	304	643	566	0	2	4,004	3,523
Jul - Sept	3,106	2,968	382	367	165	135	582	411	721	831	0	2	4,956	4,714
Oct - Dec	3,226	2,988	315	417	117	128	389	611	677	638	0	0	4,724	4,782
Jan - June	4,586	4,563	541	579	197	174	1,040	641	1,343	1,413	0	3	7,707	7,373
Jan - Sept	7,692	7,531	923	946	362	309	1,622	1,052	2,064	2,244	0	5	12,663	12,087
Jan - Dec	10,918	10,519	1,238	1,363	479	437	2,011	1,663	2,741	2,882	0	5	17,387	16,869
Kedah														
Jan - Mar	3,003	2,934	359	334	114	105	4,281	3,591	757	812	2	0	8,516	7,776
Apr - June	3,200	3,467	295	378	207	59	3,272	3,145	731	595	1	0	7,706	7,644
Jul - Sept	3,779	3,478	275	355	174	91	3,751	3,313	709	735	0	0	8,688	7,972
Oct - Dec	3,430	3,747	383	449	115	70	2,767	3,248	509	870	0	1	7,204	8,385
Jan - June	6,203	6,401	654	712	321	164	7,553	6,736	1,488	1,407	3	0	16,222	15,420
Jan - Sept	9,982	9,879	929	1,067	495	255	11,304	10,049	2,197	2,142	3	0	24,910	23,392
Jan - Dec	13,412	13,626	1,312	1,516	610	325	14,071	13,297	2,706	3,012	3	1	32,114	31,777
Pahang														
Jan - Mar	3,475	2,764	266	255	41	29	1,502	1,324	260	238	0	0	5,544	4,610
Apr - June	3,072	2,597	252	308	46	34	1,514	1,169	229	222	0	0	5,113	4,330
Jul - Sept	3,408	3,046	344	300	73	52	1,695	1,506	266	289	0	0	5,786	5,193
Oct - Dec	3,007	3,013	298	377	60	48	1,294	1,249	259	282	0	0	4,918	4,969
Jan - June	6,547	5,361	518	563	87	63	3,016	2,493	489	460	0	0	10,657	8,940
Jan - Sept	9,955	8,407	862	863	160	115	4,711	3,999	755	749	0	0	16,443	14,133
Jan - Dec	12,962	11,420	1,160	1,240	220	163	6,005	5,248	1,014	1,031	0	0	21,361	19,102
Terengganu														
Jan - Mar	4,649	3,529	147	118	10	7	968	674	1,072	786	0	0	6,846	5,114
Apr - June	3,639	4,732	92	126	7	11	782	755	697	950	0	0	5,217	6,574
Jul - Sept	4,424	4,409	95	111	5	15	908	751	1,004	1,011	0	1	6,436	6,298
Oct - Dec	3,525	3,890	141	121	4	35	709	765	788	910	0	0	5,167	5,721
Jan - June	8,288	8,261	239	244	17	18	1,750	1,429	1,769	1,736	0	0	12,063	11,688
Jan - Sept	12,712	12,670	334	355	22	33	2,658	2,180	2,773	2,747	0	1	18,499	17,986
Jan - Dec	16,237	16,560	475	476	26	68	3,367	2,945	3,561	3,657	0	1	23,666	23,707

Jadual IV / Table IV
Bilangan Transaksi Harta Tanah Mengikut Negeri dan Tempoh Masa
Number of Property Transactions by State and Time Period

Time Period	Residential		Commercial		Industrial		Agriculture		Development Land		Others		Total	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Kelantan														
Jan - Mar	1,908	1,541	85	112	10	4	1,837	1,453	310	335	0	0	4,150	3,445
Apr - June	1,703	1,365	93	99	8	3	1,374	1,091	218	278	0	0	3,396	2,836
Jul - Sept	1,692	1,521	102	128	4	4	1,472	1,422	284	314	0	0	3,554	3,389
Oct - Dec	1,388	1,459	89	137	4	3	1,015	1,316	211	298	0	0	2,707	3,213
Jan - June	3,611	2,906	178	211	18	7	3,211	2,544	528	613	0	0	7,546	6,281
Jan - Sept	5,303	4,427	280	339	22	11	4,683	3,966	812	927	0	0	11,100	9,670
Jan - Dec	6,691	5,886	369	476	26	14	5,698	5,282	1,023	1,225	0	0	13,807	12,883
Perlis														
Jan - Mar	292	296	33	55	1	8	645	536	93	116	0	0	1,064	1,011
Apr - June	263	283	30	41	8	5	501	558	73	121	0	0	875	1,008
Jul - Sept	297	391	32	31	6	11	563	454	95	181	1	0	994	1,068
Oct - Dec	503	310	100	32	8	7	402	474	88	151	0	0	1,101	974
Jan - June	555	579	63	96	9	13	1,146	1,094	166	237	0	0	1,939	2,019
Jan - Sept	852	970	95	127	15	24	1,709	1,548	261	418	1	0	2,933	3,087
Jan - Dec	1,355	1,280	195	159	23	31	2,111	2,022	349	569	1	0	4,034	4,061
Sabah														
Jan - Mar	1,448	1,226	276	284	95	117	547	421	177	373	0	1	2,543	2,422
Apr - June	1,431	1,199	292	249	78	94	521	349	148	241	0	0	2,470	2,132
Jul - Sept	1,593	1,723	351	416	101	119	1,351	522	245	408	0	0	3,641	3,188
Oct - Dec	1,320	1,541	345	401	94	143	476	379	248	293	0	4	2,483	2,761
Jan - June	2,879	2,425	568	533	173	211	1,068	770	325	614	0	1	5,013	4,554
Jan - Sept	4,472	4,148	919	949	274	330	2,419	1,292	570	1,022	0	1	8,654	7,742
Jan - Dec	5,792	5,689	1,264	1,350	368	473	2,895	1,671	818	1,315	0	5	11,137	10,503
Sarawak														
Jan - Mar	3,133	2,869	520	589	123	119	2,656	2,510	610	640	1	0	7,043	6,727
Apr - June	3,236	3,021	632	619	131	168	2,985	2,740	760	574	0	1	7,744	7,123
Jul - Sept	3,091	3,542	738	796	163	177	2,886	3,189	561	714	2	0	7,441	8,418
Oct - Dec	3,204	2,657	651	637	178	183	2,581	2,168	677	493	1	2	7,292	6,140
Jan - June	6,369	5,890	1,152	1,208	254	287	5,641	5,250	1,370	1,214	1	1	14,787	13,850
Jan - Sept	9,460	9,432	1,890	2,004	417	464	8,527	8,439	1,931	1,928	3	1	22,228	22,268
Jan - Dec	12,664	12,089	2,541	2,641	595	647	11,108	10,607	2,608	2,421	4	3	29,520	28,408
MALAYSIA														
Jan - Mar	57,750	53,861	7,428	8,503	1,825	1,747	21,627	18,846	5,898	6,062	8	5	94,536	89,024
Apr - June	58,428	61,112	7,740	9,099	2,005	1,988	19,968	17,601	5,323	5,311	2	5	93,466	95,116
Jul - Sept	64,913	68,552	8,561	11,408	2,214	2,199	22,995	20,188	6,423	6,577	7	9	105,113	108,933
Oct - Dec	62,099	67,061	9,080	11,453	2,038	2,223	17,450	19,035	5,320	6,155	5	8	95,992	105,935
Jan - June	116,178	114,973	15,168	17,602	3,830	3,735	41,595	36,447	11,221	11,373	10	10	188,002	184,140
Jan - Sept	181,091	183,525	23,729	29,010	6,044	5,934	64,590	56,635	17,644	17,950	17	19	293,115	293,073
Jan - Dec	243,190	250,586	32,809	40,463	8,082	8,157	82,040	75,670	22,964	24,105	22	27	389,107	399,008

Jadual V / Table V
Nilai Transaksi Harta Tanah Mengikut Negeri dan Tempoh Masa (RM Juta)
Value of Property Transactions by State and Time Period (RM Million)

JABATAN PENILAIAN &
PERKHIDMATAN HARTA

Time Period	Residential		Commercial		Industrial		Agriculture		Development Land		Others		Total	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
Kelantan														
Jan - Mar	308.52	256.57	38.98	38.59	28.24	1.82	118.60	91.93	52.62	31.17	0.00	0.00	546.95	420.07
Apr - June	279.70	237.60	38.60	38.12	5.12	9.98	116.06	75.06	21.94	36.60	0.00	0.00	461.42	397.37
Jul - Sept	298.20	266.17	44.84	216.86	3.95	11.85	98.51	91.20	29.27	28.56	0.00	0.00	474.77	614.64
Oct - Dec	249.54	249.22	37.56	55.00	5.66	1.48	67.54	82.15	22.06	33.14	0.00	0.00	382.36	421.00
Jan - June	588.22	494.17	77.58	76.71	33.36	11.80	234.65	166.98	74.56	67.77	0.00	0.00	1,008.38	817.43
Jan - Sept	886.42	760.35	122.43	293.57	37.31	23.65	333.17	258.19	103.83	96.33	0.00	0.00	1,483.15	1,432.07
Jan - Dec	1,135.96	1,009.57	159.99	348.57	42.96	25.13	400.71	340.34	125.89	129.47	0.00	0.00	1,865.51	1,853.07
Perlis														
Jan - Mar	69.46	54.53	16.15	31.30	0.78	4.85	50.82	42.04	7.81	10.35	0.00	0.00	145.03	143.08
Apr - June	62.65	65.25	16.68	18.50	4.00	2.55	43.48	43.73	15.18	17.21	0.00	0.00	141.99	147.23
Jul - Sept	61.97	77.86	17.98	15.73	3.39	5.32	46.77	36.97	20.76	20.56	0.59	0.00	151.45	156.44
Oct - Dec	74.96	79.95	40.41	16.94	8.07	6.71	31.77	37.69	11.85	16.40	0.00	0.00	167.06	157.69
Jan - June	132.11	119.78	32.83	49.80	4.78	7.40	94.31	85.77	23.00	27.56	0.00	0.00	287.02	290.30
Jan - Sept	194.08	197.64	50.81	65.53	8.17	12.72	141.07	122.74	43.76	48.11	0.59	0.00	438.48	446.74
Jan - Dec	269.03	277.59	91.22	82.48	16.24	19.43	172.84	160.42	55.61	64.51	0.59	0.00	605.54	604.43
Sabah														
Jan - Mar	572.85	481.40	149.66	188.44	187.17	146.32	393.79	134.51	99.03	244.73	0.00	1.18	1,402.50	1,196.59
Apr - June	554.66	481.13	168.62	158.82	98.30	164.82	259.55	111.37	243.65	171.31	0.00	0.00	1,324.78	1,087.45
Jul - Sept	637.31	773.36	217.34	309.01	141.76	114.58	654.05	243.67	188.84	246.87	0.00	0.00	1,839.30	1,687.48
Oct - Dec	512.95	636.15	268.20	218.84	138.90	288.65	213.76	166.71	104.52	172.34	0.00	2.81	1,238.33	1,485.50
Jan - June	1,127.51	962.53	318.28	347.27	285.47	311.14	653.34	245.88	342.68	416.04	0.00	1.18	2,727.28	2,284.04
Jan - Sept	1,764.82	1,735.89	535.62	656.28	427.23	425.72	1,307.39	489.54	531.52	662.91	0.00	1.18	4,566.58	3,971.52
Jan - Dec	2,277.77	2,372.04	803.82	875.12	566.13	714.37	1,521.14	656.25	636.04	835.25	0.00	3.99	5,804.90	5,457.01
Sarawak														
Jan - Mar	1,003.62	913.06	272.98	332.22	79.26	133.91	534.88	324.72	339.13	320.52	0.21	0.00	2,230.08	2,024.42
Apr - June	1,047.11	1,003.72	283.53	332.67	126.86	85.28	401.07	381.92	366.17	311.18	0.00	5.85	2,224.73	2,120.63
Jul - Sept	1,041.37	1,172.51	406.20	446.31	114.41	140.25	422.17	434.76	365.65	678.21	0.91	0.00	2,350.72	2,872.04
Oct - Dec	1,093.30	980.19	365.72	432.09	147.34	127.77	465.46	322.86	343.72	346.09	8.60	8.76	2,424.14	2,217.77
Jan - June	2,050.72	1,916.78	556.51	664.90	206.12	219.19	935.95	706.63	705.30	631.70	0.21	5.85	4,454.81	4,145.05
Jan - Sept	3,092.10	3,089.29	962.72	1,111.21	320.53	359.44	1,358.12	1,141.39	1,070.95	1,309.91	1.12	5.85	6,805.53	7,017.08
Jan - Dec	4,185.40	4,069.48	1,328.44	1,543.30	467.87	487.21	1,823.58	1,464.25	1,414.66	1,656.00	9.72	14.62	9,229.67	9,234.85
MALAYSIA														
Jan - Mar	22,952.80	20,863.39	7,239.03	8,783.14	5,124.93	5,519.73	4,122.76	3,803.32	2,503.59	3,132.01	17.24	9.67	41,960.35	42,111.26
Apr - June	22,668.22	23,916.66	6,779.61	7,976.05	5,624.80	5,419.43	4,456.38	3,258.65	2,907.53	2,672.05	3.94	11.91	42,440.48	43,254.75
Jul - Sept	25,018.24	28,361.11	7,841.10	10,530.40	4,498.48	5,890.37	5,047.56	7,687.12	4,117.42	4,583.31	71.94	83.28	46,594.74	57,135.58
Oct - Dec	23,636.92	27,787.61	10,753.70	11,019.36	5,916.01	7,108.17	4,230.31	3,922.38	3,509.88	4,476.29	31.79	17.58	48,078.62	54,331.40
Jan - June	45,621.02	44,780.05	14,018.64	16,759.19	10,749.72	10,939.17	8,579.14	7,061.97	5,411.11	5,804.06	21.19	21.58	84,400.83	85,366.02
Jan - Sept	70,639.26	73,141.16	21,859.74	27,289.59	15,248.21	16,829.54	13,626.70	14,749.09	9,528.54	10,387.37	93.12	104.86	130,995.56	142,501.59
Jan - Dec	94,276.18	100,928.77	32,613.44	38,308.95	21,164.22	23,937.71	17,857.02	18,671.47	13,038.42	14,863.66	124.91	122.44	179,074.19	196,832.99

Horizontal and vertical total may not add up to the shown figures due to rounding off.

Jadual Gambaran Keseluruhan
Overview Table

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Jadual VIII/ Table VIII
Penawaran Unit Kediaman di Malaysia
Supply of Residential Units in Malaysia

State	Existing Stock			Completion			Incoming Supply			Starts			Planned Supply			New Planned Supply		
	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change
	W.P. Kuala Lumpur	535,937	544,892	1.7	12,374	7,516	-39.3	41,647	48,395	16.2	14,290	14,996	4.9	57,674	56,465	1.4	26,769	14,841
W.P. Putrajaya	17,765	18,396	3.6	428	500	16.8	3,055	2,512	-17.8	0	0	ND	3,252	3,252	0.0	0	0	ND
W.P. Labuan	13,174	13,217	0.3	239	43	-82.0	1,135	953	-16.0	49	34	-30.6	5	216	4220.0	0	34	ND
Selangor	1,657,709	1,695,545	2.3	19,741	21,448	8.6	99,875	87,946	-11.9	18,253	19,865	8.8	80,623	79,672	-1.2	18,622	17,593	-5.5
Johor	894,510	911,355	1.9	9,479	10,456	10.3	43,531	37,893	-13.0	12,313	9,892	-19.7	60,968	42,173	-30.8	5,276	9,924	88.1
Pulau Pinang	547,272	549,799	0.5	3,675	5,599	52.4	31,139	30,665	-1.5	10,585	6,379	-39.7	15,542	14,207	-8.6	6,629	3,610	-45.5
Perak	514,929	529,293	2.8	5,118	7,212	40.9	44,746	40,446	-9.6	9,203	8,224	-10.6	35,565	37,231	4.7	9,001	8,384	-6.9
Negeri Sembilan	297,754	304,202	2.2	3,562	4,511	26.6	21,203	19,178	-9.6	7,550	4,011	-46.9	25,825	24,839	-3.8	1,762	1,488	-15.6
Melaka	212,841	215,732	1.4	2,222	1,437	-35.3	22,341	24,562	9.9	4,876	5,126	5.1	14,968	20,740	38.6	7,516	8,877	18.1
Kedah	346,127	352,419	1.8	1,259	2,020	60.4	19,589	16,006	-18.3	3,899	3,347	-14.2	10,883	12,401	13.9	1,259	2,700	114.5
Pahang	299,156	303,814	1.6	4,294	3,801	-11.5	15,884	15,323	-3.5	4,593	4,412	-3.9	33,035	32,644	-1.2	2,128	4,768	124.1
Terengganu	107,717	115,564	7.3	615	2,030	230.1	17,915	12,436	-30.6	1,541	1,161	-24.7	9,620	9,515	-1.1	865	1,511	74.7
Kelantan	88,914	90,546	1.8	1,138	1,155	1.5	11,215	11,240	0.2	1,987	1,692	-14.8	4,006	3,725	-7.0	2,110	1,338	-36.6
Perlis	27,198	27,436	0.9	339	238	-29.8	1,275	1,180	-7.5	258	203	-21.3	1,594	1,993	25.0	657	550	-16.3
Sabah	235,195	243,010	3.3	3,758	3,128	-16.8	20,311	18,281	-10.0	4,323	3,230	-25.3	26,871	22,060	-17.9	593	353	-40.5
Sarawak	284,085	288,814	1.7	3,740	3,799	1.6	17,050	17,965	5.4	4,084	5,542	35.7	7,524	7,158	-4.9	5,924	4,993	-15.7
MALAYSIA	6,080,283	6,204,034	2.0	71,981	74,893	4.0	411,911	385,001	-6.5	97,804	88,114	-9.9	387,955	370,291	-4.6	89,111	80,964	-9.1

Stok sedia ada, penawaran akan datang dan penawaran yang dirancang sebagaimana diperolehi pada hujung tahun berkenaan.
The existing stock, incoming supply and planned supply are as at the end of the year.

Inventori harta tanah bagi unit siap dibina, mula dibina dan penawaran baru dirancang adalah jumlah terkumpul bagi tempoh kajian.
Property inventory for completion, starts dan new planned supply are accumulated over the survey period.

Sumber: Laporan Stok Pasaran Harta - NAPIC
 Source: Property Stock Report - NAPIC

State	Existing Stock			Completion			Incoming Supply			Starts			Planned Supply			New Planned Supply		
	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change
W.P. Kuala Lumpur	32,162	32,613	1.4	57	0	-100.0	1,072	1,107	3.3	41	35	-14.6	1,534	1,609	4.9	254	11	-95.7
W.P. Putrajaya	538	538	0.0	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
W.P. Labuan	1,019	1,049	2.9	30	16	-46.7	34	50	47.1	0	0	ND	20	0	-100.0	20	0	-100.0
Selangor	110,574	113,923	3.0	588	301	-48.8	5,467	6,178	13.0	333	932	179.9	3,571	3,341	-6.4	490	988	101.6
Johor	93,575	98,103	4.8	1,187	1,355	14.2	5,664	5,091	-10.1	631	688	9.0	6,267	4,623	-26.2	926	1,097	18.5
Pulau Pinang	39,164	40,069	2.3	219	346	56.0	978	1,084	10.8	349	219	-37.2	1,961	1,882	-4.0	285	169	-40.7
Perak	63,142	64,128	1.6	145	194	33.8	2,320	2,198	-5.3	168	400	138.1	3,316	3,048	-8.1	277	163	-44.8
Negeri Sembilan	27,211	27,501	1.1	38	53	39.5	868	926	6.7	75	218	190.7	2,342	2,278	-2.7	2	194	9600.0
Melaka	23,211	23,501	1.2	31	68	119.4	1,235	1,241	0.5	110	108	-1.8	1,258	1,560	24.0	135	406	200.7
Kedah	32,338	32,910	1.8	36	211	486.1	1,096	911	-16.9	114	197	72.8	809	806	-0.4	94	121	28.7
Pahang	25,865	26,309	1.7	108	202	87.0	1,221	1,281	4.9	227	331	45.8	3,447	3,200	-7.2	158	118	-25.3
Terengganu	8,640	8,841	2.3	139	62	-55.4	956	842	-11.9	33	85	157.6	706	635	-10.1	36	23	-36.1
Kelantan	14,380	14,606	1.6	271	127	-53.1	1,016	1,108	9.1	38	242	536.8	742	725	-2.3	59	216	266.1
Perlis	5,798	5,828	0.5	80	12	-85.0	293	317	8.2	10	36	260.0	779	805	3.3	7	62	785.7
Sabah	32,866	34,709	5.6	679	146	-78.5	1,996	1,774	-11.1	336	164	-51.2	2,366	2,075	-12.3	44	94	113.6
Sarawak	37,371	40,172	7.5	392	278	-29.1	1,222	1,345	10.1	281	510	81.5	1,408	1,318	-6.4	498	926	85.9
MALAYSIA	547,854	564,800	3.1	4,000	3,371	-15.7	25,438	25,453	0.1	2,746	4,165	51.7	30,526	27,905	-8.6	3,285	4,578	39.4

Stok sedia ada, penawaran akan datang dan penawaran yang dirancang sebagaimana diperolehi pada hujung tahun berkenaan.
The existing stock, incoming supply and planned supply are as at the end of the year.

Inventori harta tanah bagi unit siap dibina, mula dibina dan penawaran baru dirancang adalah jumlah terkumpul bagi tempoh kajian.
Property inventory for completion, starts dan new planned supply are accumulated over the survey period.

Sumber: Laporan Stok Pasaran Harta - NAPIC
Source: Property Stock Report - NAPIC

Jadual X / Table X
 Penawaran dan Penghunan Kompleks Perniagaan di Malaysia
 Supply and Occupancy of Shopping Complex in Malaysia

State	Total Space (s.m.)		Completion (s.m.)		Occupancy (s.m.)		Occupancy Rate (%)		Annual Take-Up Difference (s.m.)		Incoming Supply (s.m.)		Starts (s.m.)		Planned Supply (s.m.)		New Planned Supply (s.m.)	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
W.P. Kuala Lumpur	3,250,139	3,443,345	9,290	181,537	2,666,727	2,885,989	82.7	83.8	-23,269	199,262	481,797	253,781	60,386	0	196,691	196,691	69,960	0
W.P. Putrajaya	86,017	79,744	0	0	70,864	63,131	82.4	79.2	-4,800	-7,753	29,277	29,277	0	0	0	0	0	0
W.P. Labuan	28,614	28,614	0	0	27,555	27,649	96.3	96.6	163	94	0	0	0	0	0	0	0	0
Selangor	3,959,058	3,953,291	177,092	0	3,069,598	3,148,989	77.5	79.7	61,399	79,391	331,202	331,202	0	0	0	0	0	0
Johor	2,456,467	2,455,302	0	5,852	1,691,273	1,732,338	68.8	70.6	-90,527	41,065	3,716	3,716	0	0	0	0	0	0
Pulau Pinang	1,844,184	1,864,139	32,500	0	1,338,480	1,366,074	72.6	73.3	16,573	27,594	190,552	190,552	0	0	96,421	96,421	0	0
Perak	1,095,112	1,026,479	15,437	9,119	834,312	899,251	76.2	87.6	10,422	64,939	24,373	14,443	7,654	0	0	3,549	0	0
Negeri Sembilan	605,456	613,611	0	8,155	403,475	415,428	66.6	67.7	-1,112	11,953	8,155	0	2,621	0	0	0	0	0
Melaka	635,388	635,622	0	0	388,601	396,668	61.2	62.4	-16,642	8,067	57,245	57,245	0	0	0	0	0	0
Kedah	596,952	601,899	6,965	0	423,549	419,823	71.0	69.7	-14,500	-3,726	0	0	0	0	15,045	15,045	0	0
Pahang	450,826	459,105	0	9,894	324,113	336,049	71.9	73.2	12,811	11,936	9,894	0	9,894	0	15,373	15,373	0	0
Terengganu	204,564	204,564	0	0	162,129	159,122	79.3	77.8	4,530	-3,007	126,520	126,520	0	0	0	0	0	0
Kelantan	403,475	403,475	22,195	0	330,379	325,048	81.9	80.6	28,711	-5,331	0	0	0	0	0	0	0	0
Perlis	56,421	60,692	0	4,271	47,046	51,402	83.4	84.7	-4,859	4,356	38,527	34,256	26,382	0	0	0	0	0
Sabah	751,388	774,292	0	0	568,714	631,807	75.7	81.6	18,075	63,093	35,743	44,470	0	0	23,509	23,509	0	0
Sarawak	1,084,338	1,084,230	0	0	834,349	829,417	76.9	76.5	10,751	-4,932	41,676	41,676	0	0	0	0	0	0
MALAYSIA	17,508,399	17,688,404	263,479	218,828	13,201,184	13,688,185	75.4	77.4	7,726	487,001	1,378,677	1,127,138	106,937	0	347,039	350,588	69,960	0

Stok sedia ada, penawaran akan datang dan penawaran yang dirancang sebagaimana diperolehi pada hujung tahun berkenaan.
 The existing stock, incoming supply and planned supply are as at the end of the year.

Inventori harta tanah bagi unit siap dibina, mula dibina dan penawaran baru dirancang adalah jumlah terkumpul bagi tempoh kajian.
 Property inventory for completion, starts dan new planned supply are accumulated over the survey period.

Sumber: Laporan Stok Pasaran Harta - NAPIC
 Source: Property Stock Report - NAPIC

Jadual XI / Table XI
Penawaran dan Penghunian Pejabat Binaan Khas di Malaysia
Supply and Occupancy of Purpose-Built Office in Malaysia

State	Total Space (s.m.)		Completion (s.m.)		Occupancy (s.m.)		Occupancy Rate (%)		Annual Take-Up Difference (s.m.)		Incoming Supply (s.m.)		Starts (s.m.)		Planned Supply (s.m.)		New Planned Supply (s.m.)	
	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023	2022	2023
W.P. Kuala Lumpur	9,813,927	10,236,990	293,814	339,804	7,237,348	7,382,703	73.7	72.1	38,299	145,355	978,869	716,680	283,250	0	790,806	761,621	412,422	0
W.P. Putrajaya	2,540,853	2,540,853	0	0	2,325,662	2,337,762	91.5	92.0	24,380	12,100	59,940	59,940	0	0	31,545	39,875	0	8,330
W.P. Labuan	67,051	67,051	0	0	62,210	62,365	92.8	93.0	1,530	155	0	0	0	0	0	0	0	0
Selangor	4,547,884	4,659,431	29,154	0	3,134,983	3,383,345	68.9	72.6	189,648	248,362	60,243	60,243	0	0	10,276	0	0	0
Johor	1,394,909	1,409,618	32,500	15,792	978,822	1,000,482	70.2	71.0	-18,481	21,660	197,433	181,641	0	0	33,817	33,817	0	0
Pulau Pinang	1,075,427	1,081,974	0	15,433	922,088	922,666	85.7	85.3	-26,114	578	56,486	76,693	0	0	44,408	28,975	0	0
Perak	652,885	667,897	2,738	14,407	600,455	617,571	92.0	92.5	6,160	17,116	23,174	8,767	0	0	0	11,305	0	0
Negeri Sembilan	342,435	344,041	0	1,606	311,253	314,506	90.9	91.4	-789	3,253	10,437	8,831	1,606	0	0	0	0	0
Melaka	416,781	410,637	0	0	352,274	353,682	84.5	86.1	10,971	1,408	0	0	0	0	0	0	0	0
Kedah	432,028	432,028	0	0	389,885	391,669	90.2	90.7	-5,321	1,784	0	0	0	0	0	0	0	0
Pahang	421,719	421,719	0	0	371,119	376,828	88.0	89.4	-705	5,709	36,375	36,375	0	0	4,911	4,911	0	0
Terengganu	427,243	429,000	63,767	0	413,913	415,470	96.9	96.8	66,095	1,557	9,704	9,704	9,704	0	31,760	31,760	0	0
Kelantan	391,077	391,077	0	0	368,602	368,804	94.3	94.3	3,068	202	0	0	0	0	0	0	0	0
Perlis	131,038	131,038	0	0	126,590	122,930	96.6	93.8	-3,098	-3,660	25,085	25,085	0	0	0	0	0	0
Sabah	826,013	831,922	0	3,677	725,537	734,232	87.8	88.3	14,228	8,695	14,744	11,067	0	0	37,498	37,498	0	0
Sarawak	820,737	828,753	0	8,016	748,280	759,519	91.2	91.6	7,130	11,239	56,952	55,925	0	0	0	0	0	0
MALAYSIA	24,301,807	24,884,029	421,973	398,735	19,069,021	19,544,534	78.5	78.5	307,001	475,513	1,529,442	1,250,851	294,560	0	985,021	949,762	412,422	8,330

Stok sedia ada, penawaran akan datang dan penawaran yang dirancang sebagaimana diperolehi pada hujung tahun berkenaan.
The existing stock, incoming supply and planned supply are as at the end of the year.

Inventori harta tanah bagi unit siap dibina, mula dibina dan penawaran baru dirancang adalah jumlah terkumpul bagi tempoh kajian.
Property inventory for completion, starts dan new planned supply are accumulated over the survey period.

Sumber: Laporan Stok Pasaran Harta - NAPIC
Source: Property Stock Report - NAPIC

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Jadual Gambaran Keseluruhan
Overview Table

Jadual XII / Table XII
Penawaran unit SOHO di Malaysia
Supply of SOHO units in Malaysia

State	Existing Stock			Completion			Incoming Supply			Starts			Planned Supply			New Planned Supply		
	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change
	W.P. Kuala Lumpur	7,418	9,069	22.3	1,028	1,110	8.0	5,726	4,313	-24.7	0	0	ND	4,266	5,247	23.0	1,367	300
W.P. Putrajaya	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
W.P. Labuan	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
Selangor	40,122	43,177	7.6	3,981	319	-92.0	16,040	19,298	20.3	0	5,114	ND	7,463	4,084	-45.3	0	891	ND
Johor	2,843	3,269	15.0	0	120	ND	966	1,486	53.8	0	640	ND	3,316	1,015	-69.4	0	0	ND
Pulau Pinang	3,627	4,257	17.4	1,013	0	-100.0	2,459	1,863	-24.2	0	0	ND	626	626	0.0	577	0	-100.0
Perak	577	577	0.0	0	0	ND	654	1,078	64.8	0	424	ND	2,737	2,737	0.0	0	0	ND
Negeri sembilan	104	104	0.0	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
Melaka	0	0	ND	0	0	ND	352	352	0.0	0	0	ND	0	0	ND	0	0	ND
Kedah	64	0	-100.0	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
Pahang	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
Terengganu	0	0	ND	0	0	ND	0	0	ND	0	0	ND	53	53	0.0	0	0	ND
Kelantan	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
Perlis	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
Sabah	467	467	0.0	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
Sarawak	405	563	39.0	0	0	ND	72	72	0.0	0	0	ND	0	0	ND	0	0	ND
MALAYSIA	55,627	61,483	10.5	6,022	1,549	-74.3	26,269	28,462	8.3	0	6,178	ND	18,461	13,762	-25.5	1,944	1,191	-38.7

Stok sedia ada, penawaran akan datang dan penawaran yang dirancang sebagaimana diperolehi pada hujung tahun berkenaan.
The existing stock, incoming supply and planned supply are as at the end of the year.

Inventori harta tanah bagi unit siap dibina, mula dibina dan penawaran baru dirancang adalah jumlah terkumpul bagi tempoh kajian.
Property inventory for completion, starts dan new planned supply are accumulated over the survey period.

Sumber: Laporan Stok Pasaran Harta - NAPIC
Source: Property Stock Report - NAPIC

State	Existing Stock			Completion			Incoming Supply			Starts			Planned Supply			New Planned Supply		
	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change
	W.P. Kuala Lumpur	100,249	116,013	15.7	13,289	13,185	-0.8	63,478	55,746	-12.2	6,641	6,137	-7.6	48,215	49,514	2.7	6,020	5,612
W.P. Putrajaya	746	1,204	61.4	0	458	ND	781	323	-58.6	0	0	ND	0	940	ND	0	0	ND
W.P. Labuan	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
Selangor	94,333	111,852	18.6	8,760	8,345	-5.0	54,743	57,140	4.4	7,590	5,261	-30.7	21,377	21,814	2.0	4,348	6,103	40.4
Johor	86,257	93,747	8.7	232	1,070	361.2	18,913	20,561	8.7	1,568	2,013	28.4	53,717	26,917	-49.9	0	1,639	ND
Pulau Pinang	7,372	8,189	11.1	768	0	-100.0	5,114	6,478	26.7	2,994	1,930	-35.5	6,438	7,480	16.2	2,397	1,905	-20.5
Perak	1,314	1,567	19.3	0	253	ND	428	710	65.9	24	535	2,129.2	985	1,257	27.6	310	408	31.6
Negeri sembilan	11,285	14,498	28.5	0	3,213	ND	5,129	2,462	-52.0	252	546	116.7	1,006	460	-54.3	0	0	ND
Melaka	6,363	8,850	39.1	0	0	ND	5,805	5,698	-1.8	240	723	201.3	4,126	6,218	50.7	0	2,480	ND
Kedah	637	637	0.0	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
Pahang	6,398	7,464	16.7	0	0	ND	212	731	244.8	212	519	144.8	6,152	6,338	3.0	648	705	8.8
Terengganu	132	143	8.3	0	0	ND	0	0	ND	0	0	ND	132	132	0.0	0	0	ND
Kelantan	858	1,694	97.4	0	0	ND	0	0	ND	0	0	ND	1,358	1,358	0.0	668	0	-100.0
Perlis	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
Sabah	1,913	2,716	42.0	698	508	-27.2	2,917	1,886	-35.3	981	0	-100.0	2,378	2,378	0.0	0	0	ND
Sarawak	1,295	1,436	10.9	190	0	-100.0	966	1,750	81.2	237	288	21.5	119	431	262.2	0	600	ND
MALAYSIA	319,152	370,010	15.9	23,947	27,032	12.9	158,486	153,485	-3.2	20,739	17,952	-13.4	146,003	125,237	-14.2	14,391	19,452	35.2

Stok sedia ada, penawaran akan datang dan penawaran yang dirancang sebagaimana diperolehi pada hujung tahun berkenaan.
The existing stock, incoming supply and planned supply are as at the end of the year.

Inventori harta tanah bagi unit siap dibina, mula dibina dan penawaran baru dirancang adalah jumlah terkumpul bagi tempoh kajian.
Property inventory for completion, starts dan new planned supply are accumulated over the survey period.

Sumber: Laporan Stok Pasaran Harta - NAPIC
Source: Property Stock Report - NAPIC

Jadual XIV / Table XIV
Penawaran Unit Industri di Malaysia
Supply of Industrial Units in Malaysia

JABATAN PENILAIAN &
 PERKHIDMATAN HARTA

State	Existing Stock			Completion			Incoming Supply			Starts			Planned Supply			New Planned Supply		
	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change
	W.P. Kuala Lumpur	5,138	5,138	0.0	0	0	ND	0	0	ND	0	0	ND	37	37	0.0	0	0
W.P. Putrajaya	48	48	0.0	0	0	ND	0	0	ND	0	0	ND	0	0	ND	0	0	ND
W.P. Labuan	641	649	1.2	0	0	ND	8	41	412.5	0	27	ND	0	0	ND	0	0	ND
Selangor	41,642	42,008	0.9	201	134	-33.3	1,578	1,518	-3.8	263	158	-39.9	1,768	2,125	20.2	342	590	72.5
Johor	18,718	19,205	2.6	58	356	513.8	728	508	-30.2	56	362	546.4	818	70	-91.4	16	45	181.3
Pulau Pinang	9,714	9,788	0.8	122	20	-83.6	99	256	158.6	10	114	1040.0	138	91	-34.1	0	172	ND
Perak	8,482	8,507	0.3	11	25	127.3	107	104	-2.8	0	4	ND	338	303	-10.4	23	5	-78.3
Negeri sembilan	5,574	5,574	0.0	16	0	-100.0	170	184	8.2	109	14	-87.2	596	659	10.6	0	127	ND
Melaka	7,184	7,214	0.4	0	30	ND	803	773	-3.7	0	0	ND	1,783	1,917	7.5	0	134	ND
Kedah	3,869	3,873	0.1	0	4	ND	69	86	24.6	0	21	ND	347	339	-2.3	40	13	-67.5
Pahang	3,647	3,680	0.9	12	0	-100.0	49	36	-26.5	0	19	ND	224	272	21.4	5	84	1580.0
Terengganu	866	908	4.8	0	28	ND	83	47	-43.4	0	0	ND	66	66	0.0	0	0	ND
Kelantan	630	630	0.0	13	0	-100.0	5	5	0.0	0	0	ND	44	46	4.5	13	2	-84.6
Perlis	296	296	0.0	0	0	ND	30	69	130.0	0	47	ND	140	139	-0.7	0	46	ND
Sabah	6,317	6,331	0.2	16	0	-100.0	224	188	-16.1	20	0	-100.0	265	360	35.8	8	37	362.5
Sarawak	7,467	7,525	0.8	140	34	-75.7	252	231	-8.3	79	37	-53.2	136	166	22.1	21	117	457.1
MALAYSIA	120,233	121,374	0.9	589	631	7.1	4,205	4,046	-3.8	537	803	49.5	6,700	6,590	-1.6	468	1,372	193.2

Stok sedia ada, penawaran akan datang dan penawaran yang dirancang sebagaimana dipamerkan pada hujung tahun berkenaan.
The existing stock, incoming supply and planned supply are as at the end of the year.

Inventori harta tanah bagi unit siap dibina, mula dibina dan penawaran baru dirancang adalah jumlah terkumpul bagi tempoh kajian.
Property inventory for completion, starts dan new planned supply are accumulated over the survey period.

Sumber: Laporan Stok Pasaran Harta - NAPIC
 Source: Property Stock Report - NAPIC

State	Existing Stock			Completion			Incoming Supply			Starts			Planned Supply			New Planned Supply		
	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change	2022	2023	% Change
	W.P. Kuala Lumpur	45,576	47,177	3.5	157	674	329.3	3,112	3,646	17.2	250	0	-100.0	4,308	983	-77.2	190	432
W.P. Putrajaya	1,769	1,769	0.0	0	0	ND	0	0	ND	0	0	ND	0	270	ND	0	0	ND
W.P. Labuan	1,697	1,697	0.0	0	0	ND	80	116	45.0	0	0	ND	0	0	ND	0	0	ND
Selangor	24,201	24,965	3.2	0	364	ND	878	514	-41.5	0	0	ND	200	200	0.0	0	0	ND
Johor	31,791	31,184	-1.9	0	0	ND	2,450	3,087	26.0	353	0	-100.0	3,401	3,133	-7.9	0	0	ND
Pulau Pinang	23,185	24,034	3.7	948	697	-26.5	4,106	3,324	-19.0	37	690	1764.9	2,617	1,266	-51.6	29	0	-100.0
Perak	16,451	16,450	0.0	0	0	ND	685	685	0.0	54	0	-100.0	835	361	-56.8	0	301	ND
Negeri Sembilan	9,542	9,536	-0.1	0	0	ND	1,546	1,546	0.0	0	0	ND	358	358	0.0	0	0	ND
Melaka	18,055	18,223	0.9	0	0	ND	432	336	-22.2	0	0	ND	1,558	1,558	0.0	0	0	ND
Kedah	13,251	13,154	-0.7	0	0	ND	539	756	40.3	0	0	ND	252	430	70.6	0	178	ND
Pahang	25,601	25,624	0.1	0	0	ND	0	0	ND	0	0	ND	696	677	-2.7	0	0	ND
Terengganu	10,809	11,139	3.1	0	102	ND	640	538	-15.9	0	0	ND	752	280	-62.8	0	0	ND
Kelantan	4,360	4,360	0.0	0	0	ND	144	144	0.0	0	0	ND	0	0	ND	0	0	ND
Perlis	1,245	1,245	0.0	0	0	ND	120	120	0.0	0	0	ND	120	120	0.0	0	0	ND
Sabah	23,402	23,420	0.1	236	0	-100.0	2,869	3,328	16.0	807	0	-100.0	3,016	3,258	8.0	0	0	ND
Sarawak	20,387	21,142	3.7	0	388	ND	318	0	-100.0	0	0	ND	0	0	ND	0	0	ND
MALAYSIA	271,322	275,119	1.4	1,341	2,225	65.9	17,919	18,140	1.2	1,501	690	-54.0	18,113	12,894	-28.8	219	911	316.0

Stok sedia ada, penawaran akan datang dan penawaran yang dirancang sebagaimana diperolehi pada hujung tahun berkenaan.
The existing stock, incoming supply and planned supply are as at the end of the year.

Inventori harta tanah bagi unit siap dibina, mula dibina dan penawaran baru dirancang adalah jumlah terkumpul bagi tempoh kajian.
Property inventory for completion, starts and new planned supply are accumulated over the survey period.

Sumber: Laporan Stok Pasaran Harta - NAPIC
Source: Property Stock Report - NAPIC

Jadual XVI / Table XVI

Bilangan & Prestasi Jualan Pelancaran Baru dan Bilangan & Nilai Unit Kediaman yang Tidak Terjual di Malaysia

Number and Sales Performance of New Launches and Number and Value of Unsold Residential Units in Malaysia

State	Newly Launched		Completed		Under Construction		Not Constructed	
	2022	2023	2022	2023	2022	2023	2022	2023
Malaysia								
Units Launched	54,118	56,526						
Units Sold	19,497	22,861	27,746	25,816	57,649	51,132	11,053	7,926
Sales Performance	36.0	40.4	18,414.33	17,680.39	NA	NA	NA	NA
W.P. Kuala Lumpur								
Units Launched	10,324	5,927						
Units Sold	4,870	1,700	3,429	3,535	10,120	6,128	3,700	2,714
Sales Performance	47.2	28.7	3,149.19	3,632.51	NA	NA	NA	NA
W.P. Putrajaya								
Units Launched	547	338						
Units Sold	3	90	231	137.00	0	424	25	0
Sales Performance	0.5	26.6	165.04	277.01	NA	NA	NA	NA
W.P. Labuan								
Units Launched	0	55						
Units Sold	0	18	47	42	37	89	0	18
Sales Performance	0.0	32.7	15.37	13.73	NA	NA	NA	NA
Selangor								
Units Launched	11,176	11,542						
Units Sold	3,006	6,348	3,698	3,405	7,160	6,068	1,598	2,090
Sales Performance	26.9	55.0	3,358.94	3,632.28	NA	NA	NA	NA
Johor								
Units Launched	7,718	12,390						
Units Sold	3,287	5,320	5,258	4,228	5,071	4,817	724	57
Sales Performance	42.6	42.9	4,326.72	3,396.10	NA	NA	NA	NA
Pulau Pinang								
Units Launched	4,442	5,208						
Units Sold	1,437	2,148	3,593	3,001	4,969	5,093	113	126
Sales Performance	32.4	41.2	2,742.12	2,607.96	NA	NA	NA	NA
Perak								
Units Launched	6,052	5,443						
Units Sold	2,121	1,797	2,312	4,598	9,338	6,841	1,151	299
Sales Performance	35.0	33.0	775.95	1231.53	NA	NA	NA	NA
Negeri Sembilan								
Units Launched	2,451	3,060						
Units Sold	885	1,086	886	1,177	3,339	1,978	272	651
Sales Performance	36.1	35.5	486.29	473.48	NA	NA	NA	NA
Melaka								
Units Launched	2,241	2,706						
Units Sold	786	1,050	697	532	2,578	3,123	411	633
Sales Performance	35.1	38.8	246.43	216.81	NA	NA	NA	NA
Kedah								
Units Launched	612	437						
Units Sold	286	228	1,174	199	2,104	3,090	6	119
Sales Performance	46.7	52.2	414.15	87.26	NA	NA	NA	NA
Pahang								
Units Launched	3,153	4,074						
Units Sold	1,226	1,592	1,044	492	1,983	1,845	1,119	306
Sales Performance	38.9	39.1	430.32	212.98	NA	NA	NA	NA
Terengganu								
Units Launched	399	190						
Units Sold	136	31	442	308.00	682	445	23	0
Sales Performance	34.1	16.3	160.42	119.36	NA	NA	NA	NA
Kelantan								
Units Launched	692	840						
Units Sold	214	153	389	360	2,606	3,342	877	109
Sales Performance	30.9	18.2	164.59	112.91	NA	NA	NA	NA
Perlis								
Units Launched	155	372						
Units Sold	73	173	29	6	236	338	0	0
Sales Performance	47.1	46.5	3.01	2.16	NA	NA	NA	NA
Sabah								
Units Launched	2,784	1,852						
Units Sold	712	620	2,718	2,068	4,234	3,928	474	101
Sales Performance	25.6	33.5	1,174.12	934.66	NA	NA	NA	NA
Sarawak								
Units Launched	1,372	2,092						
Units Sold	455	507	1,799	1,728	3,192	3,583	560	703
Sales Performance	33.2	24.2	801.69	729.63	NA	NA	NA	NA

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Jadual XVII / Table XVII
Bilangan Unit Kedai yang Tidak Terjual di Malaysia
Number of Unsold Shop Units in Malaysia

State	Completed		Under Construction		Not Constructed	
	2022	2023	2022	2023	2022	2023
Malaysia						
Unsold Units	6,720	6,233	2,777	2,852	365	456
Value (RM Million)	5,841.83	5,393.32	NA	NA	NA	NA
W. P. Kuala Lumpur						
Unsold Units	82	23	51	0	0	0
Value (RM Million)	50.02	8.05	NA	NA	NA	NA
W. P. Putrajaya						
Unsold Units	17	9	0	0	0	0
Value (RM Million)	60.65	34.33	NA	NA	NA	NA
W. P. Labuan						
Unsold Units	0	0	9	0	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
Selangor						
Unsold Units	404	374	510	461	0	16
Value (RM Million)	476.68	439.14	NA	NA	NA	NA
Johor						
Unsold Units	1,731	1,517	1,005	1,036	13	30
Value (RM Million)	1,674.77	1,537.28	NA	NA	NA	NA
Pulau Pinang						
Unsold Units	143	94	45	44	0	0
Value (RM Million)	91.58	53.84	NA	NA	NA	NA
Perak						
Unsold Units	707	613	125	97	0	92
Value (RM Million)	336.98	299.63	NA	NA	NA	NA
Negeri Sembilan						
Unsold Units	455	411	7	30	35	6
Value (RM Million)	293.57	258.13	NA	NA	NA	NA
Melaka						
Unsold Units	277	192	50	25	0	19
Value (RM Million)	214.72	162.42	NA	NA	NA	NA
Kedah						
Unsold Units	314	356	182	131	0	0
Value (RM Million)	213.15	249.25	NA	NA	NA	NA
Pahang						
Unsold Units	552	349	40	172	287	231
Value (RM Million)	397.46	224.32	NA	NA	NA	NA
Terengganu						
Unsold Units	180	104	14	20	0	0
Value (RM Million)	143.41	104.39	NA	NA	NA	NA
Kelantan						
Unsold Units	246	403	24	163	30	8
Value (RM Million)	141.49	267.60	NA	NA	NA	NA
Pertis						
Unsold Units	64	32	34	38	0	0
Value (RM Million)	40.54	23.36	NA	NA	NA	NA
Sabah						
Unsold Units	661	739	379	391	0	54
Value (RM Million)	512.94	505.69	NA	NA	NA	NA
Sarawak						
Unsold Units	887	1,017	302	244	0	0
Value (RM Million)	1,193.87	1,225.89	NA	NA	NA	NA

Sumber: Laporan Status Pasaran Harta Tanah - NAPIC
Source: Property Market Status Report - NAPIC

Jadual Gambaran Keseluruhan
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Jadual XVIII / Table XVIII
Bilangan Unit SOHO yang Tidak Terjual di Malaysia
Number of Unsold SOHO Units in Malaysia

State	Completed		Under Construction		Not Constructed	
	2022	2023	2022	2023	2022	2023
Malaysia						
Unsold Units	2,239	1,686	6,970	5,061	1,088	61
Value (RM Million)	1,448.50	1,130.15	NA	NA	NA	NA
W. P. Kuala Lumpur						
Unsold Units	788	709	2184	987		0
Value (RM Million)	781.06	663.76	NA	NA	NA	NA
W. P. Putrajaya						
Unsold Units	0	0				0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
W. P. Labuan						
Unsold Units	0	0				0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
Selangor						
Unsold Units	944	429	3311	2772	712	61
Value (RM Million)	414.43	188.21	NA	NA	NA	NA
Johor						
Unsold Units	331	347	88	166	376	0
Value (RM Million)	184.56	207.95	NA	NA	NA	NA
Pulau Pinang						
Unsold Units	38	35	1258	1065	0	0
Value (RM Million)	24.43	19.20	NA	NA	NA	NA
Perak						
Unsold Units	0	28	58	0	0	0
Value (RM Million)	0.00	7.02	NA	NA	NA	NA
Negeri Sembilan						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
Melaka						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
Kedah						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
Pahang						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
Terengganu						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
Kelantan						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
Perlis						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
Sabah						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
Sarawak						
Unsold Units	138	138	71	71	0	0
Value (RM Million)	44.01	44.01	NA	NA	NA	NA

Jadual XIX / Table XX
Bilangan Pangsapuri Khidmat yang Tidak Terjual di Malaysia
Number of Serviced Apartment Units in Malaysia

State	Completed		Under Construction		Not Constructed	
	2022	2023	2022	2023	2022	2023
Malaysia						
Unsold Units	23,978	20,825	33,101	23,795	10,644	6,604
Value (RM Million)	20,194.55	16,628.43	NA	NA	NA	NA
W. P. Kuala Lumpur						
Unsold Units	6,012	4,806	14,401	8,974	7,164	4,004
Value (RM Million)	5,495.97	4,587.14	NA	NA	NA	NA
W. P. Putrajaya						
Unsold Units	0	84	110	0	0	0
Value (RM Million)	0.00	31.62	NA	NA	NA	NA
W. P. Labuan						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
Selangor						
Unsold Units	2,926	2,065	8,212	6,774	925	1,738
Value (RM Million)	1,747.94	1,154.98	NA	NA	NA	NA
Johor						
Unsold Units	14,132	11,710	5,851	4,722	753	0
Value (RM Million)	12,233.82	9,717.69	NA	NA	NA	NA
Pulau Pinang						
Unsold Units	419	311	642	453	120	35
Value (RM Million)	545.17	420.81	NA	NA	NA	NA
Perak						
Unsold Units	0	0	276	234	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
Negeri Sembilan						
Unsold Units	0	1,348	2,075	546	0	0
Value (RM Million)	0.00	553.77	NA	NA	NA	NA
Melaka						
Unsold Units	58	24	92	340	213	0
Value (RM Million)	26.66	11.63	NA	NA	NA	NA
Kedah						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
Pahang						
Unsold Units	91	80	1,332	1,448	1,197	827
Value (RM Million)	35.06	36.32	NA	NA	NA	NA
Terengganu						
Unsold Units	99	92	0	0	0	0
Value (RM Million)	42.79	39.80	NA	NA	NA	NA
Kelantan						
Unsold Units	241	225	0	0	272	0
Value (RM Million)	67.13	42.30	NA	NA	NA	NA
Perlis						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
Sabah						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
Sarawak						
Unsold Units	0	80	110	304	0	0
Value (RM Million)	0.00	32.37	NA	NA	NA	NA

Sumber: Laporan Status Pasaran Harta Tanah - NAPIC
Source: Property Market Status Report - NAPIC
Total may not add up to the shown figures due to rounding off

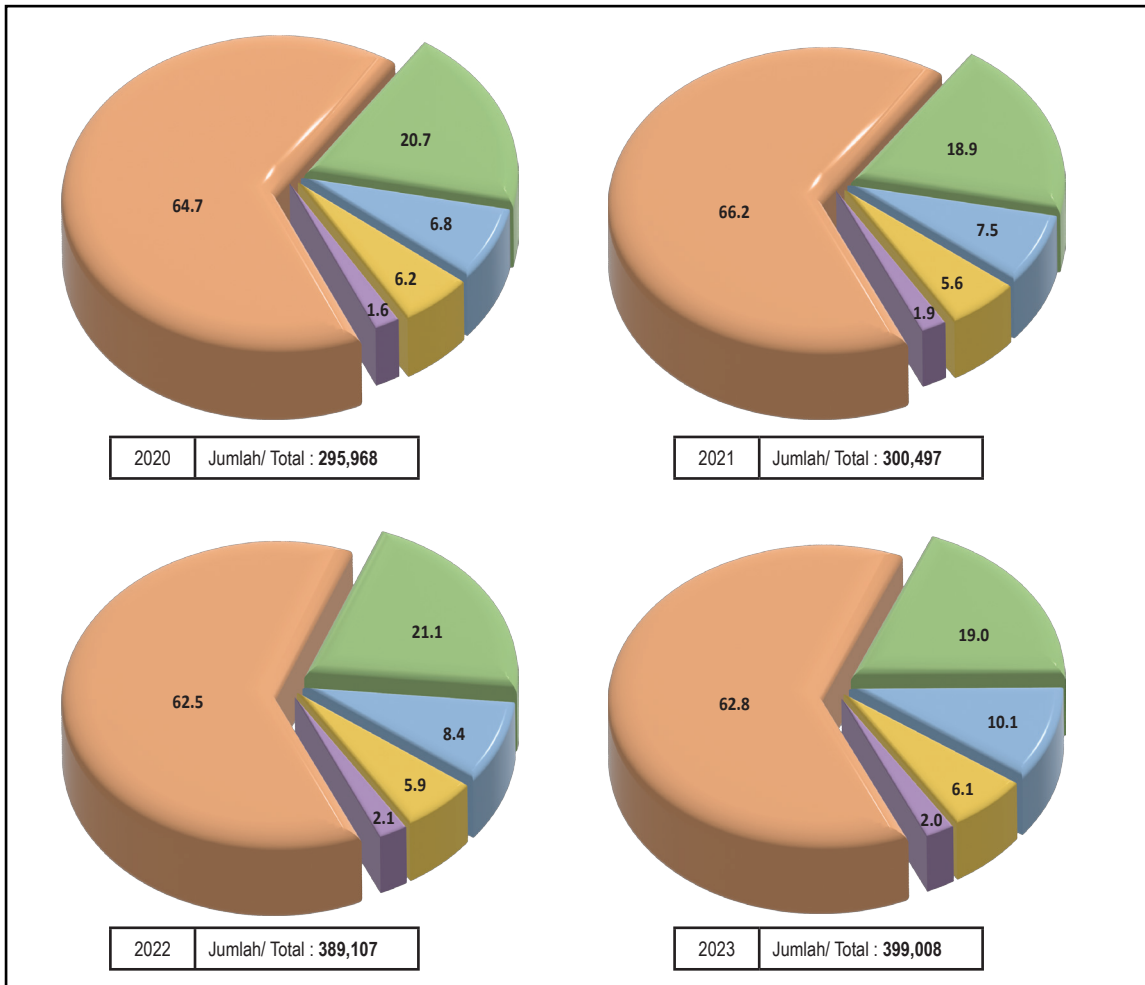
Jadual Gambaran Keseluruhan
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Jadual XX / Table XIX
Bilangan Unit Industri yang Tidak Terjual di Malaysia
Number of Unsold Industrial Units in Malaysia

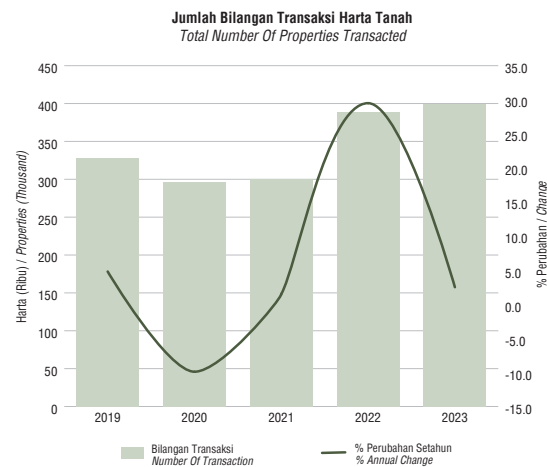
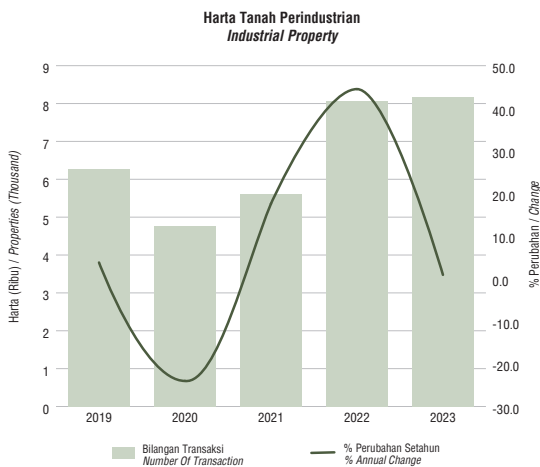
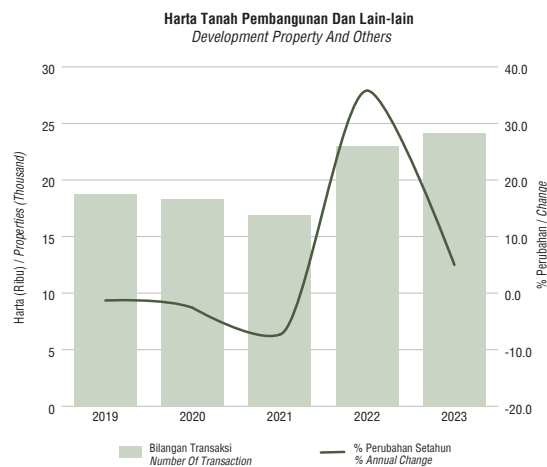
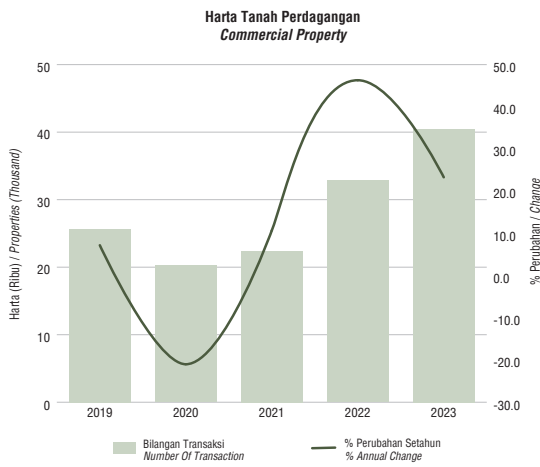
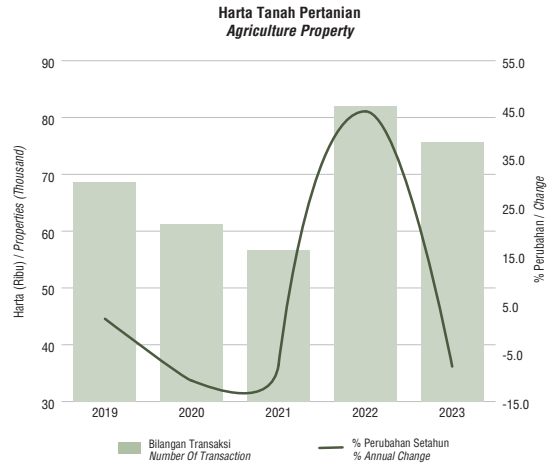
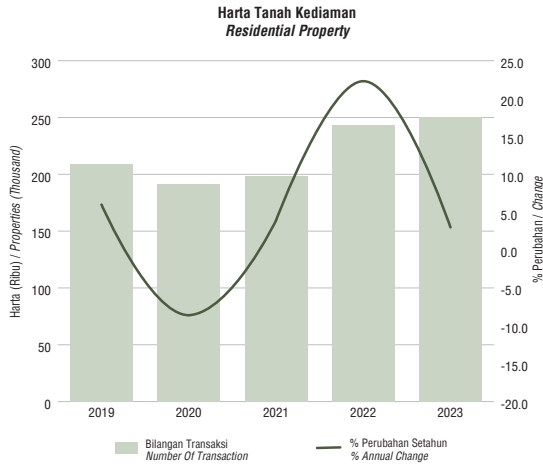
State	Completed		Under Construction		Not Constructed	
	2022	2023	2022	2023	2022	2023
Malaysia						
Unsold Units	880	808	450	457	51	22
Value (RM Million)	1,146.49	838.80	NA	NA	NA	NA
W. P. Kuala Lumpur						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
W. P. Putrajaya						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
W. P. Labuan						
Unsold Units	0	0	0	0	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
Selangor						
Unsold Units	45	45	42	155	0	0
Value (RM Million)	105.81	105.81	NA	NA	NA	NA
Johor						
Unsold Units	205	173	124	126	10	0
Value (RM Million)	470.59	216.78	NA	NA	NA	NA
Pulau Pinang						
Unsold Units	85	7	11	18	0	0
Value (RM Million)	196.25	22.40	NA	NA	NA	NA
Perak						
Unsold Units	54	78	36	12	0	0
Value (RM Million)	43.12	59.63	NA	NA	NA	NA
Negeri Sembilan						
Unsold Units	54	41	49	40	0	0
Value (RM Million)	43.08	22.75	NA	NA	NA	NA
Melaka						
Unsold Units	17	9	9	0	0	0
Value (RM Million)	14.53	8.72	NA	NA	NA	NA
Kedah						
Unsold Units	0	20	20	0	0	0
Value (RM Million)	0.00	9.98	NA	NA	NA	NA
Pahang						
Unsold Units	78	51	15	0	0	0
Value (RM Million)	48.06	39.24	NA	NA	NA	NA
Terengganu						
Unsold Units	14	14	0	0	0	0
Value (RM Million)	4.95	4.95	NA	NA	NA	NA
Kelantan						
Unsold Units	0	0	26	26	0	0
Value (RM Million)	0.00	0.00	NA	NA	NA	NA
Perlis						
Unsold Units	10	0	0	0	0	0
Value (RM Million)	5.50	0.00	NA	NA	NA	NA
Sabah						
Unsold Units	21	47	44	0	22	22
Value (RM Million)	17.96	128.67	NA	NA	NA	NA
Sarawak						
Unsold Units	297	323	74	80	19	0
Value (RM Million)	196.65	219.87	NA	NA	NA	NA

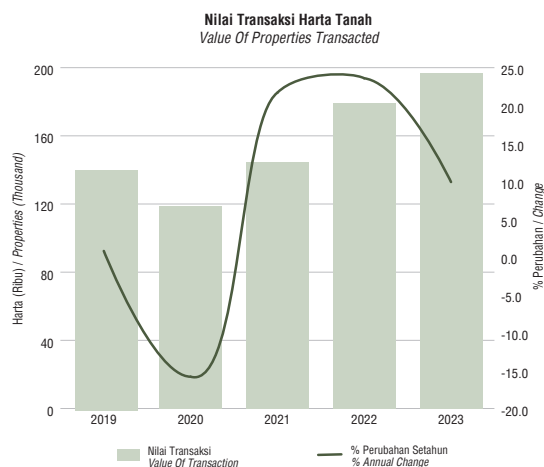
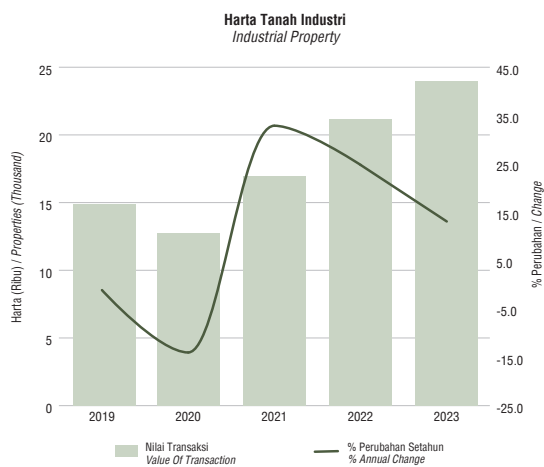
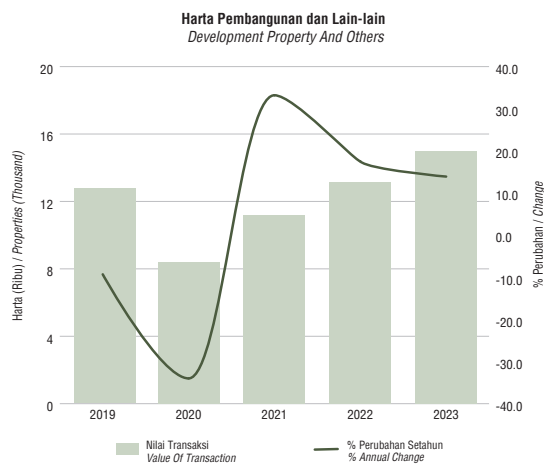
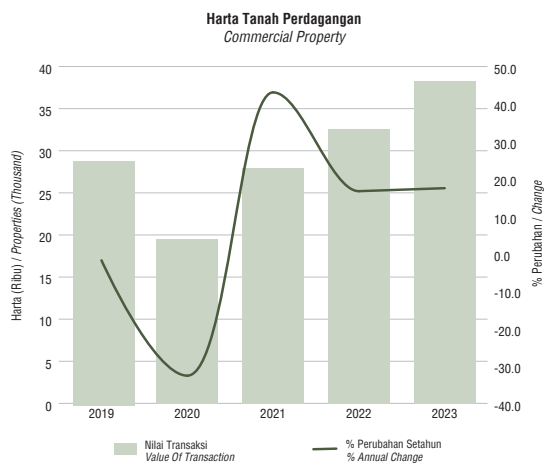
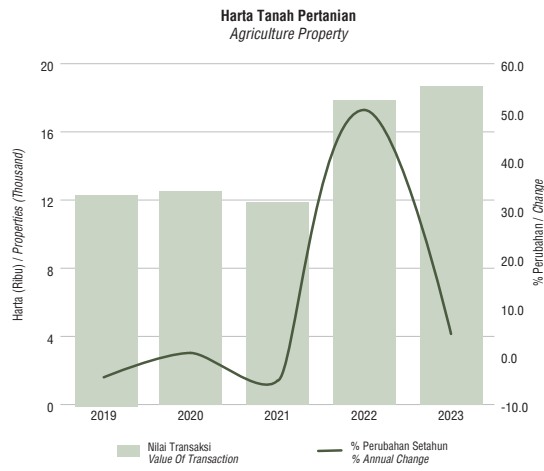
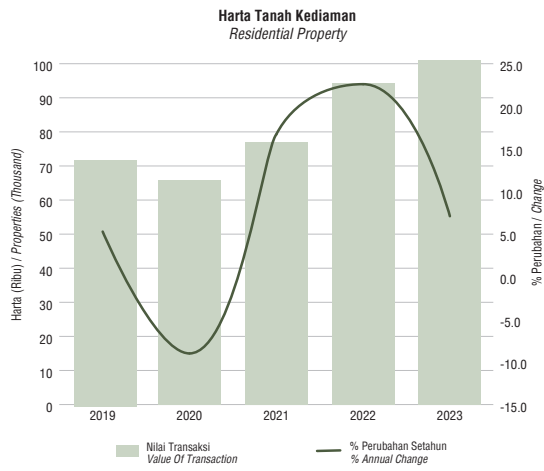
Chart I / Chart I
Jumlah dan Peratus Pecahan Transaksi Harta Tanah Mengikut Subsektor
Total and Percentage Share of Properties Transacted by SubSector



Subsektor/ Sub-sector	Bilangan Harta/ Number of Properties				% Pecahan/ Share			
	2020	2021	2022	2023	2020	2021	2022	2023
Kediaman/ Residential	191,354	198,812	243,190	250,586	64.7	66.2	62.5	62.8
Pertanian/ Agriculture	61,326	56,730	82,040	75,670	20.7	18.9	21.1	19.0
Komersial/ Commercial	20,255	22,428	32,809	40,463	6.8	7.5	8.4	10.1
Tanah Pembangunan Dan Lain-lain/ Development Land and Others	18,275	16,932	22,986	24,132	6.2	5.6	5.9	6.1
Industri/ Industrial	4,758	5,595	8,082	8,157	1.6	1.9	2.1	2.0
Jumlah/ Total	295,968	300,497	389,107	399,008	100	100	100	100

Carta II / Chart II
Bilangan Transaksi dan Peratus Perubahan
Number of Transaction and Percentage Change





CATATAN TEKNIKAL
TECHNICAL NOTES

Catatan Teknikal Technical Notes

Lampiran I

Appendix I

LAPORAN PASARAN HARTA 2023

PROPERTY MARKET REPORT 2023

1. Tempoh Kajian

Tempoh kajian Laporan Pasaran Harta ini adalah tahun 2023, iaitu Januari hingga Disember.

2. Data transaksi

Data transaksi adalah tidak termasuk penjualan harta tanah daripada pemaju di pasaran primer yang hakmilik individu/ hakmilik strata belum dikeluarkan.

3. Sektor Harta Tanah

Pada amnya, kandungan laporan tertumpu kepada subsektor harta tanah berikut:

- (i) Kediaman
- (ii) Pejabat
- (iii) Kedai & Kompleks Perniagaan
- (iv) Industri
- (v) Pertanian
- (vi) Tanah Pembangunan
- (vii) Harta Riadah

Klasifikasi kegunaan tanah bagi setiap subsektor harta tanah dinyatakan di Lampiran II.

4. Stok

Rujukan stok diperoleh daripada Laporan Stok Harta Kediaman, Laporan Stok Harta Komersial dan Industri, Laporan Stok Harta Riadah dan Laporan Status Pasaran Harta Tanah yang diterbitkan oleh Pusat Maklumat Harta Tanah Negara (NAPIC), Jabatan Penilaian dan Perkhidmatan Harta. Definisi adalah seperti di Lampiran III.

5. Definisi

(i) Saiz Sampel = Bilangan unit pemerhatian yang akan digunakan untuk analisis adalah jumlah keseluruhan unit yang didapati di sesuatu lokasi ATAU satu sampel yang boleh memberikan gambaran jualan/sewaan yang ada di lokasi itu.

(ii) Keluasan Purata Tanah =
$$\frac{\text{Jumlah keluasan tanah bagi semua jualan untuk sesuatu lokasi}}{\text{Bilangan jualan terpilih di sesuatu lokasi}}$$

(iii) Keluasan Purata Lantai/Plot =
$$\frac{\text{Jumlah keluasan lantai/ plot bagi semua jualan/sewaan terpilih sesuatu lokasi}}{\text{Bilangan jualan terpilih di sesuatu lokasi}}$$

1. Review Period

The review period for this Property Market Report is the year of 2023 i.e. January to December.

2. Transaction Data

The transaction data do not include the property sales from developers in the primary market for which individual title/strata title has yet been issued.

3. Property Sectors

Generally, the report contents focus on the following property sub-sectors:

- (i) Residential
- (ii) Office
- (iii) Shop & Shopping Complexes
- (iv) Industrial
- (v) Agriculture
- (vi) Development Land
- (vii) Leisure Property

Land use classification for each property sub-sector is given in Appendix II.

4. Stock

Stock refers to stock as defined in the Residential Property Stock Report, Commercial and Industrial Stock Report, Leisure Property Stock Report and The Property Market Status Report published by the National Property Information Centre (NAPIC), Valuation and Property Services Department. The definition is given in Appendix III.

5. Definition

(i) Sample Size = The number of elementary units that are to be drawn into the analysis are either the total elementary units found in a location OR a sample size which can provide inferences to the total sales/lettings available.

(ii) Average Land Area =
$$\frac{\text{Total land area of all sales selected for the location}}{\text{Number of selected sales for the location}}$$

(iii) Average Floor/ Plot =
$$\frac{\text{Total floor/plot area of all selected sales/ lettings for the location}}{\text{Number of selected sales/ lettings for the location}}$$

'Keluasan Lantai' untuk pelbagai jenis harta adalah sebagaimana takrif di dalam 'Uniform Method of Measurement of Buildings' yang diterbitkan oleh Pertubuhan Juru Ukur Malaysia.

The 'Floor Area' for various types of properties is as defined in the 'Uniform Method of Measurement of Buildings' published by the Institution of Surveyors, Malaysia.

iv) Lingkungan Harga/Sewa = Julat/lingkungan yang menunjukkan harga/sewa terendah hingga tertinggi bagi semua jualbeli terpilih di sesuatu lokasi. Sebagai contoh, sekiranya harga terendah ialah RM18,000 sehektar dan harga tertinggi ialah RM25,000 sehektar, lingkungan harga adalah di antara RM18,000 hingga RM25,000 sehektar.

iv) Price/Rental Range = It is a range denoting the lowest to the highest price/rental of all sales selected for a location. For example, if the lowest price is RM18,000 per hectare and the highest price is 25,000 per hectare, the range is between RM18,000 and RM25,000 per hectare.

v) Harga/Sewa (RM/m.p.) =
$$\frac{\text{Harga Jualan/Sewa (RM)}}{\text{Keluasan Lantai (m.p.)}}$$

v) Price/Rental (RM/s.m.) =
$$\frac{\text{Sale Price/Rental (RM)}}{\text{Floor Area (s.m.)}}$$

Ia adalah harga jualan/sewa individu yang dinyatakan semasa pertukaran hakmilik/sewa di pasaran terbuka.

It is the individual sale price/rental declared during the change of ownership/letting in the open market.

vi) Perubahan Harga/sewa Purata (%) =
$$\left\{ \frac{\text{harga/ sewa purata 2023 bagi sesuatu lokasi}}{\text{harga/ sewa purata 2022 bagi sesuatu lokasi}} - 1 \right\} \times 100$$

vi) Average Price/Rental Change (%) =
$$\left\{ \frac{\text{2023 average price/ rental for the location}}{\text{2022 average price/ rental for the location}} - 1 \right\} \times 100$$

vii) Huruf 'NA' menandakan keadaan di mana tiada bukti jualan/sewa pada 2022 yang boleh dibandingkan dengan sampel yang dipilih pada 2023.

vii) The letter 'NA' denotes that there are no sale/rental evidences available in 2022 which are comparable to the sample selected for 2023.

viii) Huruf 'ND' menandakan keadaan di mana perubahan harga/sewa yang dikira tidak dapat memberikan gambaran yang sebenar.

viii) The letter 'ND' denotes that the calculated average price/rental change is misleading as to the true situation.

KLASIFIKASI KEGUNAAN TANAH

LAND USE CLASSIFICATION

Berikut adalah klasifikasi kegunaan tanah yang digunakan di dalam Laporan Pasaran Harta 2023

The following are the land use classifications used in the Property Market Report 2023:

Perihal Harta	Catatan	Property Description	Remarks
1. KEDIAMAN		1. RESIDENTIAL	
a. Rumah Teres		a. Terraced House	
(i) Kos rendah satu tingkat	}	(i) Single storey low-cost	}
(ii) Satu tingkat	} Mengikut bilangan	(ii) Single storey	}
(iii) Kos rendah dua tingkat	} tingkat dan kos	(iii) Double storey low-cost	} Subdivided by
(iv) Kos sederhana dua tingkat	} pembinaan	(iv) Double storey medium-cost	} reference to the number
(v) Dua tingkat	}	(v) Double storey	} of storeys and cost of
(vi) 2 hingga 3 tingkat	}	(vi) 2 to 3 storey	} construction
b. Berkembar		b. Semi-Detached	
(i) Kos rendah	}	(i) Low-cost	}
(ii) Kos sederhana	} Mengikut bilangan	(ii) Medium-cost	}
(iii) Satu tingkat	} tingkat dan kos	(iii) Single storey	} Subdivided by
(iv) Dua tingkat	} pembinaan	(iv) Double storey	} reference to the number
(v) 2 hingga 3 tingkat	}	(v) 2 to 3 storey	} of storeys and cost of
			} construction
c. Sesebuah		c. Detached	
(i) Satu tingkat di kawasan perumahan		(i) Single storey within housing area	
(ii) Dua tingkat di kawasan perumahan		(ii) Double storey within housing area	
(iii) Rekabentuk individu		(iii) Individually-designed	
d. Rumah Pangsa/ Pangsapuri/ Kondominium		d. Flat/Apartment/ Condominium	
(i) Rumah pangsa kos rendah	}	(i) Low-cost flat	}
(ii) 1 - 2 bilik tidur	} Jenis standard dan	(ii) 1 - 2 bedrooms	} Standard and luxury
(iii) 3 bilik tidur atau lebih	} mewah	(iii) 3 bedrooms or more	} types
e. Tanah Untuk Pembangunan Kediaman	} Tanah dengan	e. Land For Residential development	} Land with permission
	} kelulusan untuk		} for housing only
	} perumahan sahaja		
f. Pecahan Lot Untuk Sebuah Rumah		f. A Subdivided Lot For One House	
(i) Plot sesebuah	} Suatu lot atau bahagian	(i) Single plot	} A lot or undivided share
(ii) Tapak kecil	} yang tidak dipecah	(ii) Small site	} of a lot for up to three
	} bahagi untuk tidak		} houses
	} melebihi tiga buah		}
	} rumah		}
2. PEJABAT		2. OFFICE	
a. Blok pejabat binaan khas		a. Purpose-built office block	
b. Ruang pejabat di rumah kedai		b. Office space in shophouse	
3. KEDAI & KOMPLEKS PERNIAGAAN		3. SHOP & SHOPPING COMPLEX	
a. Kedai sebelum perang	} Dengan/tanpa	a. Pre-war shop	} With/ without vacant
	} pemilikan kosong		} possession
b. Kedai selepas perang	} Pelbagai tingkat	b. Post-war shop	} Various storeys
c. Lot perniagaan di kompleks perniagaan		c. Retail lot in shopping complex	
d. Kedai tanpa inap	} Unit kedai di tingkat	d. Lock-up shop	} Shop unit on ground
	} blok rumah pangsa/		} floor or flat/ apartment
e. Plot tanah kosong	} pangsapuri	e. Vacant Plot	

3. KEDAI & KOMPLEKS PERNIAGAAN

- a. Kedai sebelum perang } Dengan/tanpa pemilikan kosong
- b. Kedai selepas perang } Pelbagai tingkat
- c. Lot perniagaan di kompleks perniagaan
- d. Kedai tanpa inap } Unit kedai di tingkat blok rumah pangsa/ pangsapuri
- e. Plot tanah kosong

4. INDUSTRI

- a. Kilang
 - (i) Teres } Reka bentuk untuk proses pembuatan am dan lazimnya untuk jualan/disewa ATAU binaan khas untuk proses pembuatan khusus
 - (ii) Berkembar
 - (iii) Sesebuah
- b. Gudang
 - (i) Teres } Gudang yang direka untuk tujuan penyimpanan
 - (ii) Berkembar
 - (iii) Sesebuah
- c. Kompleks Perindustrian } Bangunan direka bentuk khas mengikut kesesuaian proses perindustrian
- d. Kilang Bertingkat } Unit industri berstrata di dalam bangunan bertingkat rendah
- e. Tapak Perindustrian - Plot Perindustrian

5. PERTANIAN/ LUAR BANDAR

- a. Getah
 - b. Kelapa Sawit
 - c. Padi
 - d. Kelapa
 - e. Koko
 - f. Nenas
 - g. Dusun/Hortikultur
 - h. Tanah Ladang
 - i. Perhutanan
 - j. Tanah Kampung
- Kategori-kategori ini adalah untuk kebun kecil sahaja
- Tanah yang berkeluasan 40 hektar atau lebih
- Kebun kecil dengan kegunaan kediaman kampong dan pertanian. Berbeza daripada (a-g) di atas dari segi harga. Tidak dianggap sebagai plot sesebuah, kerana terlalu besar untuk sebuah keluarga. Oleh itu, ia berada di antara harta luar bandar dan harta bandar

3. SHOP & SHOPPING COMPLEX

- a. Pre-war shop } With/ without vacant possession
- b. Post-war shop } Various storeys
- c. Retail lot in shopping complex
- d. Lock-up shop } Shop unit on ground floor or flat/ apartment
- e. Vacant Plot

4. INDUSTRIAL

- a. Factory
 - (i) Terrace } Designed for general manufacturing process and normally is for sale/letting OR purpose-built for specialised manufacturing process
 - (ii) Semi-detach
 - (iii) Detach
- b. Warehouse
 - (i) Terrace } Godowns designed for storage use
 - (ii) Semi-detach
 - (iii) Detach
- c. Industrial Complex } Individually designed buildings to suit an industrial process
- d. Flatted factory } Industrial units within a low-rise multi-storey stratified building
- e. Industrial Site - Industrial plot

5. AGRICULTURE/ RURAL

- a. Rubber
 - b. Oil palm
 - c. Paddy
 - d. Coconut
 - e. Cocoa
 - f. Pineapple
 - g. Orchard/Horticulture
 - h. Estate Land
 - i. Forestry
 - j. Kampung Land
- These categories are for small holdings only
- Land of 40 hectares or more
- Smallholdings with rural residential and agriculture uses. They are distinct from the above mentioned smallholdings (a-g) by their higher land prices. Cannot be regarded as detached plots since they are too large for single family use. Therefore, it falls between rural and urban properties

5. **TANAH PEMBANGUNAN**

- a. Kediaman
 - b. Komersial
 - c. Industri
 - d. Campuran
- } Termasuk tanah yang
} belum ditukar syarat atau
} diluluskan untuk kegunaan
} lebih tinggi atau telah
} ditukar syarat tetapi belum
} dipecah sempadan

6. **HARTA RIADAH**

- a. Hotel
- b. Motel
- c. Tempat peranginan
- d. Taman rekreasi
- e. Padang golf
- f. Marina

5. **DEVELOPMENT LAND**

- a. *Residential*
 - b. *Commercial*
 - c. *Industrial*
 - d. *Mixed*
- } Include not converted
} lands or approved for
} higher use or converted
} but not divided

6. **LEISURE PROPERTY**

- a. *Hotel*
- b. *Motel*
- c. *Resort*
- d. *Recreation park*
- e. *Golf course*
- f. *Marina*

STOK**1. Tempoh Kajian**

Laporan Stok Harta Tanah pada suku tahun 2023 adalah seperti berikut:

- Q1 : 1 Januari 2023 - 31 Mac 2023
- Q2 : 1 April 2023 - 30 Jun 2023
- Q3 : 1 Julai 2023 - 30 September 2023
- Q4 : 1 Oktober 2023 - 31 Disember 2023

2. Peringkat Penyebaran

Laporan terbahagi kepada 3 peringkat pembangunan utama dan subperingkat berpandukan jadual di bawah:

**i) Inventori Sedia Ada (Stok)**

Inventori sedia ada (stok) adalah unit yang telah memperoleh Sijil Penyiapan Dan Pematuhan (CCC), Sijil Layak Menduduki (CF) atau Sijil Layak Menduduki Sementara (TCF) sebelum tempoh kajian termasuk unit yang siap dibina dan memperoleh CCC/CF/TCF dalam tempoh kajian. Angka dalam inventori sedia ada adalah jumlah terkumpul dari suku-suku sebelumnya ditambah dengan suku semasa.

Inventori harta tanah sedia ada yang terdapat dalam laporan terdiri daripada:

- a) Suku sebelumnya
Inventori sedia ada pada akhir suku sebelumnya ditambah dengan pelarasan yang berlaku dalam tempoh tersebut tetapi belum dimasukkan dalam laporan sebelumnya.

STOCK**1. Review Periods**

The quarters in the 2023 of the Property Stock Report are as follows:

- Q1 : 1 January 2023 - 31 March 2023
- Q2 : 1 April 2023 - 30 June 2023
- Q3 : 1 July 2023 - 30 September 2023
- Q4 : 1 October 2023 - 31 December 2023

2. Stages of Dissemination

Information at the 3 main stages of development and their sub-stages according to the chart below:

**i) Existing Inventory (Stock)**

Existing inventory (stock) are units that have been issued with the Certificate of Completion and Compliance (CCC), Certificate Of Fitness (CF) or Temporary Certificate Of Fitness (TCF) prior to the review period plus units completed and issued with CCC/CF/TCF within the review period. The figures in the existing inventory are accumulated figures from previous quarters plus the review quarter.

The existing property inventory in the publications comprises of:

- a) Previous Quarter
The existing inventory as at the end of the previous quarter plus the adjustments that occurred within that period but was not included in the previous publication.

Pelarasan yang dibuat bagi inventori yang diterbitkan sebelumnya merangkumi:

- **Pertambahan kawasan liputan kajian.** Pengiraan inventori adalah berterusan dan belum mencapai liputan 100%,
- **Data tertunda dari suku sebelumnya tetapi diterima dalam suku semasa,**
- **Kesilapan dalam operasi.**

b. Suku Kajian

Inventori sedia ada pada akhir suku sebelumnya (selepas pelarasan) ditambah dengan unit yang siap dibina yang memperoleh CCC/CF/TCF serta sebarang perubahan yang berlaku dalam tempoh kajian. Perubahan termasuk:

- **Sebarang unit yang ditukar kategori kegunaan.**
- **Sebarang unit yang musnah/dibina semula (dan tidak terdapat dalam penawaran baharu dirancang).**
- **Sebarang perubahan dalam ruang yang dihuni.**

(iii) **Siap Dibina**

Siap dibina adalah terma yang digunakan bagi bangunan yang mana kerja pembinaan bangunan telah siap dan CCC/CF/TCF telah diperolehi dalam tempoh kajian. Angka dalam peringkat siap dibina bukan merupakan angka terkumpul dari unit siap dibina suku-suku sebelumnya tetapi mewakili hanya satu suku kajian sahaja.

(iv) **Penawaran Akan Datang**

Penawaran akan datang merangkumi unit yang mana kerja pembinaannya sedang dijalankan termasuk unit mula dibina dan CCC/CF/TCF belum dikeluarkan dalam tempoh kajian. Unit dalam penawaran akan datang mewakili jumlah terkumpul yang mana unit dalam pembinaan dalam suku kajian dan suku sebelumnya ditambah dengan unit yang memulakan pembinaan dalam suku kajian. Ianya tidak mengambil kira tanah kosong tetapi termasuk **unit tertangguh**.

Pengiraan penawaran akan datang adalah berterusan dan belum menyamai jumlah bilangan penduduk. Penawaran akan datang yang disebarkan dalam sebarang laporan suku tahunan merangkumi penawaran akan datang yang diselaraskan bagi suku sebelumnya dan penawaran akan datang dalam suku kajian. Penawaran akan datang suku sebelumnya perlu diselaraskan dalam suku kajian atas sebab-sebab berikut:

- **Pertambahan dalam kawasan liputan kajian**
- **Data tertunda dari suku sebelumnya tetapi diterima dalam suku semasa**
- **Kesilapan dalam operasi.**

Unit tertangguh ialah yang mana kerja asas bangunan secara fizikalnya telah dimulakan tetapi belum siap dibina dan tiada aktiviti pembinaan selepas tiga tahun daripada tarikh kelulusan pembangunan.

Adjustments made to previous published inventory include:

- **Increase in coverage. The inventory count is on going and has not reached a 100% coverage,**
- **Delayed data from the previous quarter but received during the review period,**
- **Operational errors.**

b. *Review Quarter*

The existing inventory at the end of the previous review period (after the above adjustments) plus completed units issued with CCC/CF/TCF plus any change that occurred within the review period. Change includes:

- **Any unit with a change in the category of use.**
- **Any unit destroyed/rebuilt (and not in the new planned supply).**
- **Any change in the space occupied.**

(iii) **Completion**

Completion is the term used when the building construction works are completed and a CCC/CF/TCF is issued within the review period. The figures under completion are not accumulated from previous quarter but represent only one review quarter.

(iv) **Incoming Supply**

*Incoming supply comprises units where physical construction works are in progress including starts and CCC/CF/TCF have not been issued during the review period. Units in the incoming supply represent accumulative totals where units under construction in the review quarter and from the previous quarter are added to the units that have started construction in the review quarter. It does not include vacant land but includes **delayed units**.*

The calculation of incoming supply is on going and has not reached a total population count. Incoming supply disseminated in any quarter publication includes the adjusted incoming supply for the previous quarter and the incoming supply in the review quarter. Incoming supply of the previous quarter have to be adjusted in the review quarter for the following reasons:

- **An increase in coverage**
- **Delayed data from the previous quarter but received during the review period,**
- **Operational errors.**

***Delayed units** are those where the foundation work has physically started but not completed and no construction activity has taken place for a period of more than 3 years from the date the development was approved.*

(iv) **Mula Dibina**

Mula dibina terdiri daripada bangunan-bangunan yang mana:

- Kerja asas dan kerja tapak bagi bangunan bertingkat rendah atau kerja bawah paras tanah termasuk cerucuk dan asas bagi bangunan bertingkat tinggi, telah dimulakan,
- Lanya tidak termasuk kerja-kerja membersihkan, merata dan menyediakan infrastruktur.

Angka dalam peringkat mula dibina bukan merupakan angka terkumpul dan mewakili bangunan yang memulakan pembinaan dalam suku kajian sahaja.

(v) **Penawaran Dirancang**

Penawaran dirancang merangkumi unit yang mana kelulusan pelan bangunan telah diperolehi daripada pihak berkuasa tempatan dalam suku kajian. Unit tersebut belum memulakan pembinaan secara fizikalnya. Unit dalam penawaran dirancang termasuk jumlah terkumpul daripada suku-suku sebelumnya ditambah dengan unit dalam penawaran baharu dirancang dalam suku kajian. Pengiraan penawaran dirancang adalah berterusan dan belum menyamai jumlah bilangan penduduk. Penawaran dirancang yang disebarkan dalam sebarang laporan suku tahunan merangkumi penawaran dirancang yang diselaraskan bagi suku sebelumnya dan penawaran baharu dirancang dalam suku kajian. Penawaran dirancang suku sebelumnya perlu diselaraskan dalam suku kajian atas sebab-sebab berikut:

- Pertambahan kawasan liputan kajian,
- Data tertunda daripada suku sebelumnya tetapi diterima dalam suku semasa,
- Kesilapan dalam operasi.

(vi) **Penawaran Baharu Dirancang**

Penawaran baharu dirancang merangkumi unit di mana kelulusan pelan bangunan telah diperolehi dari pihak berkuasa tempatan dalam suku kajian. Angka dalam peringkat penawaran baharu dirancang bukan merupakan angka terkumpul dan mewakili bangunan yang memperoleh kelulusan pelan bangunan dalam suku kajian sahaja.

3. **Penawaran masa depan** yang digunakan dalam laporan ini menunjukkan penawaran akan datang dan penawaran dirancang.

(iv) **Starts**

Starts comprises buildings where:

- The foundation and footing works of low-rise buildings or works below ground level including piling and foundation of high-rise buildings have started, and
- It does not include site clearing, levelling and laying of infrastructure.

The figures disseminated under starts are not accumulative and represents buildings that started within a review quarter.

(v) **Planned Supply**

Planned supply comprises units with building plan approval obtained within a review quarter from the local authority. The units have not started physical construction works. Units in the planned supply include accumulative totals from previous quarters plus units in the new planned supply in the review quarter. The calculation of planned supply is on going and has not reached a total population count. Planned supply disseminated in any quarter publication includes the adjusted planned supply for the previous quarter and the planned supply in the review quarter. Planned supply of the previous quarter has to be adjusted in the review for the following reasons:

- An increase in coverage,
- Delayed data from the previous quarter but received during the review period,
- Operational errors.

(vi) **New Planned Supply**

New planned supply comprises units where building plan approval have been obtained within the review period. The figures disseminated under new planned supply are not accumulative and represents buildings that have obtained building plan approval in that review quarter.

3. **Future supply** is a term used in the report to denote incoming supply and planned supply.

4. Terma Am

- (i) **Struktur**
Struktur termasuk kekal, separuh kekal dan sementara.
- (ii) **Pemilikan**
Termasuk kedai/pejabat binaan khas/kompleks perniagaan milik kerajaan dan swasta. Kerajaan termasuklah kerajaan persekutuan, negeri dan pihak berkuasa tempatan. Swasta juga merangkumi kedai yang dimiliki oleh badan separa kerajaan.
- (iii) **Kadar Serapan**
Perubahan dalam ruang dihuni (termasuk ruang siap dibina yang dihuni), dibahagikan dengan jumlah ruang kosong pada suku sebelumnya dan ruang siap dibina pada suku semasa (ataupun ruang boleh dihuni pada suku semasa).
- (iv) **Serapan Ruang Baharu**
Ruang dihuni dalam bangunan yang siap dibina dibahagikan dengan jumlah ruang siap dibina pada suku semasa.
- (v) **Serapan Ruang Terdahulu**
Perubahan ruang dihuni daripada stok sedia ada pada suku sebelumnya dibahagikan dengan ruang kosong pada suku tersebut (atau ruang boleh dihuni pada suku sebelumnya).
- (vi) **Kadar Ambilan**
Perubahan ruang dihuni antara suku semasa dengan suku sebelumnya dan dibahagikan dengan jumlah ruang dalam suku semasa.
- (vii) **Kadar Penghunian**
Ruang yang dihuni pada suku semasa dibahagikan dengan jumlah ruang sedia ada pada suku semasa.
- (viii) **Tanah Kosong** tidak dikira dalam inventori sedia ada. Setelah ianya memperoleh kelulusan pelan bangunan, ianya dimasukkan dalam penawaran dirancang dan seterusnya memasuki pelbagai peringkat pembinaannya.
- (ix) **Harga Jualan** unit adalah balasan yang dinyatakan semasa pindahmilik (Borang 14A Kanun Tanah Negara), yang menggambarkan nilai pasaran.
- (x) **Min** ialah purata mudah daripada harga jualan.

4. General Term

- (i) **Structures**
The structures included permanent, semi-permanent and temporary construction.
- (ii) **Ownership**
Include all shops/purpose-built office/shopping complexes owned by government and private sectors. Governments comprise federal, state and local authorities. Private sector embraces private companies and quasi-government agencies.
- (iii) **Absorption Rate**
Change in occupied space including the occupation of completed space divided by the vacant space in the previous quarter plus the completed space that is vacant in the current quarter (or available space in the current quarter).
- (iv) **Absorption of New Space**
The occupied space in completed buildings divided by the total space completed in the current quarter.
- (v) **Absorption of Previous Space**
The change in occupied space in the current quarter from the accumulated space of the previous quarter divided by the vacant space in the previous quarter (or available space in the previous quarter).
- (vi) **Take-up Rate**
The change in occupied space in the review quarter compared to the previous quarter divided with the total space in the review quarter.
- (vii) **Occupancy Rate**
The occupied space in the review quarter divided with the total space in the review quarter.
- (viii) **Vacant Lands** are not included under existing inventory. When they obtain building plan approval they are included under planned supply and progresses into the construction stages.
- (ix) **Sale Prices** of units are declared considerations stated on transfer (Form 14A of the National Land Code), which reflects market value.
- (x) **Mean** is a simple average of sales prices.

- (xi) **Median** ialah harga jualan di mana separuh daripada cerapan akan berada di atas paras harga jualan dan separuh daripada cerapan akan berada di bawahnya.
- (xii) **25 percentile** ialah harga jualan di mana 25% daripada cerapan berada di bawah paras tersebut.
- (xiii) **75 percentile** ialah harga jualan di mana 25% daripada cerapan berada di atas paras tersebut.
- (xiv) **Minimum** ialah harga yang paling rendah bagi beberapa cerapan yang diperolehi.
- (xv) **Maksimum** ialah harga yang paling tinggi bagi beberapa cerapan yang diperolehi.

5. Harta Tanah Kediaman

- (i) **Definisi**
Rumah tempat tinggal adalah termasuk mana-mana bangunan yang keseluruhannya atau sebahagian binaannya, disesuaikan atau diniatkan bagi kediaman manusia dan sebahagiannya bagi premis perniagaan. Istilah kediaman manusia adalah termasuk bangunan yang dibina untuk manusia tinggal bersama keluarga. Bagi tujuan laporan ini, rumah kedai, yang mana sebahagiannya digunakan untuk perniagaan dan sebahagian lagi untuk tempat tinggal adalah dikecualikan daripada harta tanah kediaman tetapi dilaporkan sebagai kedai.
Seksyen 3, Akta Pemaju Perumahan 1966 (Kawalan dan Lesen) dan (Pindaan 2002)

Laporan ini termasuk pangsapuri khidmat yang didefinisikan sebagai penginapan jangka pendek samada dimiliki oleh individu sebagai rumah kedua, rumah korporat atau sebagai pelaburan yang dijadikan sebagai hotel. Pangsapuri khidmat yang dimiliki oleh individu mempunyai ciri-ciri berikut:

- **Unit berstrata dengan syarat nyata sebagai kediaman atau komersil.**
- **Unit yang dibina di atas tanah komersial hendaklah diperuntukan sebanyak 15% daripada ruang binaan sebagai kemudahan untuk kegunaan awam. Pangsapuri khidmat yang dibina di atas tanah kediaman memerlukan pengagihan kawasan kemudahan kurang daripada 10% yang mana ianya tidak dibuka kepada orang ramai tetapi bagi kegunaan penduduk setempat sahaja.**
- **Pemilik mungkin mendiaminya sendiri atau melantik syarikat pengurusan untuk menyewakannya secara harian, mingguan, bulanan, tahunan atau pengongsian masa.**

Laporan ini tidak termasuk pangsapuri khidmat yang dijalankan sebagai hotel yang mempunyai lesen hotel dan unit yang dimiliki oleh pengusaha hotel.

- (xi) **Median** is the sales price for which one-half of the observations will lie above that price and one-half will lie below it.
- (xii) **25 percentile** is the sales price for which 25% of the observations fall below that price.
- (xiii) **75 percentile** is the sales price for which 25% of the observations fall above that price.
- (xiv) **Minimum** is the lowest price for a given number of observations.
- (xv) **Maximum** is the highest price for a given number of observations.

5. Residential Property

- (i) **Definition**
Defines housing accommodation to include any building, which is wholly or principally constructed, adapted or intended for human habitation or partly for human habitation and partly for business premises. The term human habitation would include buildings constructed for humans to live with their families. For the purpose of this report, shop houses, which is partially used as retail and partially for human habitation is excluded as residential property but reported as shop.
Section 3, The Housing Development Act 1966 (Control and Licensing) and (as amended 2002)

This report included serviced apartments which is defined as short-term accommodation either owned by an individual as a second home, as corporate housing or as an investment that may be run as a hotel. The serviced apartment owned by individuals has the following features:

- **Stratified units with title condition as residential or commercial use.**
- **The units that are built upon commercial titled lands are required to allocate more than 15% of the built up space not for supporting facilities that are open to the public. Serviced apartments built upon residential titled lands are required to allocate less than 10% of the built up space to supporting facilities that are not open to the public but facilitate internal residents only.**
- **The owner may occupy the unit himself or elect a management company to rent the unit on a daily, weekly, monthly, yearly or timesharing basis.**

This report excluded serviced apartments that are run with hoteliers licence and those units owned by hoteliers.

- (ii) **Jenis Harta Tanah**
Data diperolehi secara tinjauan dalam kawasan pihak berkuasa tempatan. Jenis harta tanah termasuk teres, berkembar, sesebuah, unit kos rendah, rumah pangsa, pangsapuri/kondominium, unit berkelompok dan rumah bandar di semua peringkat.

Walau bagaimanapun, kuarters institusi dan unit setinggan tidak termasuk dalam laporan ini.

6. HARTA TANAH KOMERSIAL

(i) Kedai

Definisi

Kedai merangkumi stor kecil di mana barang runcit dan perkhidmatan diniagakan. Barang yang dijual dan perkhidmatan yang disediakan memenuhi keperluan harian pelanggan.

Kedai adalah merangkumi:

- Rumah kedai/pangsapuri
- Pejabat kedai
- Kedai dengan kegunaan perniagaan
- Kedai makan binaan khas

Kedai tidak termasuk:

- Kedai yang telah diubahsuai 75% (menunjukkan penukaran kegunaan kekal) kepada kegunaan perdagangan lain seperti ruang pejabat.
- Kedai yang telah ditukar kegunaan secara kekal

Jenis Harta Tanah

Data berdasarkan lawat periksa dalam kawasan pihak berkuasa tempatan. Jenis harta tanah kedai adalah termasuk teres, berkembar, sesebuah, kedai tanpa inap dan kedai sebelum perang.

(ii) Pejabat Binaan Khas

Definisi

Bangunan binaan khas bermaksud satu kegunaan utama yang disokong oleh kegunaan sampingan. Kegunaan utama menggabungkan rekabentuk asal, yang mengoptimalkan ruang bagi manfaatnya. Apabila rekabentuk asal diubahsuai sebanyak 75% bagi memanfaatkan kegunaan lain, kegunaan asalnya akan ditukar dengan kegunaan baru.

Inventori pejabat binaan khas dalam laporan NAPIC termasuk tempat perniagaan berbentuk perkhidmatan dijalankan dan bukannya pembuatan atau penjualan barangan. Ruang pejabat ini diperlukan untuk aktiviti kertas kerja, komunikasi serta lain-lain aktiviti pejabat.

(ii) Property Types

The data is conducted by survey within the local authority area. Property types include terraced, semi-detached, detached, low-cost units, flats, condominium/apartment, clustered units and town houses at various levels.

However, the property excluded from this report are institutional quarters and squatter units.

6. COMMERCIAL PROPERTY

(i) Shops

Definition

Shops are small stores where retail goods and services are sold. The goods and services meet day-to-day needs of customers.

Shops include:

- Shop house/apartments
- Shop offices
- Shop with retail use
- Purpose-built eateries

Shops excluded:

- Shops that have been renovated 75% (indicating a permanent change) to other commercial uses like office space.
- Shops that has permanently changed to another use.

Property Types

The data is conducted by survey within the local authority area. Property types include terraced, semi-detached, detached, lock-up and pre-war.

(ii) Purpose-Built Offices

Definition

Purpose-built (as opposed to multi-purpose) signifies one primary use with supporting uses complimenting it. The intended use incorporates an original design, which optimises space for its benefit. When the original design is renovated by 75% to benefit another use, the original intention is replaced by the new use.

NAPIC publication of purpose-built office inventory includes places where service-orientated businesses are carried out as opposed to goods being manufactured or sold. The office space is required to attend to paperwork, communication and other office activity.

Dengan ini terma pejabat binaan khas digunakan untuk menunjukkan bangunan yang dibina secara khusus untuk pejabat sebagai kegunaan utamanya. Bagi pengumpulan dan penyebaran maklumat oleh NAPIC, kegunaan dominan bermaksud kegunaan pejabat adalah tidak kurang dari 75% daripada keluasan bersih yang disewakan. Penyebaran maklumat ruang pejabat adalah berdasarkan luas bersih yang disewakan sebagaimana yang dinyatakan di dalam 'Uniform Methods of Measurement of Buildings' yang diterbitkan oleh Pertubuhan Jurukur DiRaja Malaysia.

Termasuk di dalam laporan ini adalah:

- Ruang pejabat dalam pembangunan bersepadu
- Ruang dengan kegunaan asal misalnya pejabat tetapi telah ditukar kegunaannya buat sementara waktu

Tidak termasuk di dalam laporan ini adalah:

- Ruang pejabat dalam bangunan pelbagai guna di mana kegunaannya boleh bertukar ganti dengan kegunaan perniagaan, kediaman, hotel dan perindustrian
- Ruang pejabat yang mana telah ditukar dari kegunaan asalnya secara kekal

(iii) Kompleks Perniagaan

Definisi

Kompleks perniagaan termasuk pelbagai unit ruang perniagaan dengan laluan pejalan kaki yang tertutup bagi menggalakkan aliran pejalan kaki untuk menampung aktiviti perniagaan. Maklumat kompleks perniagaan yang disebarkan oleh NAPIC merangkumi:

- Pusat membeli-belah
- Arked perniagaan
- Pasar raya besar (*stand-alone*)

Pusat membeli-belah ialah ruang perniagaan binaan khas dominan yang dirancang, dibangunkan dan diurusniagakan dalam beberapa rangkaian dalam satu pusat untuk perniagaan. Bagi pengumpulan dan penyebaran maklumat oleh NAPIC, kegunaan dominan bermaksud kegunaan perniagaan tidak kurang dari 75% daripada luas bersih yang disewakan.

Pusat membeli-belah mempunyai:

- Jalan-jalan keluar dalam kawasan tertutup yang mempunyai kawalan suhu dan ruang laluan pejalan kaki yang lebar
- Penyewa perniagaan runcit dan perkhidmatan terpilih bagi tujuan keseimbangan perniagaan
- Satu atau lebih penyewa utama
- Satu syarikat pengurusan
- Tempat letak kereta kegunaan bersama
- Sistem penyaman udara pusat
- Perkhidmatan keselamatan pusat
- Perkhidmatan kawalan kebakaran pusat
- Lif dan eskalator kegunaan bersama
- Lampu, tunjuk arah dan landskap kegunaan bersama

Therefore the term purpose-built office is used to denote buildings that are intentionally built with office as a dominant use. In data capturing and dissemination by NAPIC, dominant use means office use not less than 75% of the net lettable area. Office space information is disseminated based on the net lettable floor area according to the Uniform Methods of Measurement of Buildings published by the Royal Institution of Surveyors Malaysia.

Included within the inventory are:

- *Office space within integrated development*
- *Space with the original use as office but has changed use on a temporary basis*

Excluded from the inventory are:

- *Office space within multipurpose buildings where use can interchange with retail, residential, hotel and industrial use*
- *Office space that has permanently changed from the original use*

(iii) Shopping Complex

Definition

Shopping complexes include multi-unit retail establishments under a covered walkway that encourages pedestrian flow to sustain business activity. Shopping complexes disseminated by NAPIC includes:

- *Shopping centres*
- *Shopping arcades*
- *Hypermarkets (stand-alone)*

Shopping centres are purpose-built dominant retail establishments planned, developed and operated as a number of outlets within a centre for trade. In data capturing and dissemination by NAPIC, dominant use means retail use not less than 75% of the net lettable area.

Shopping centres have:

- *Outlets within an enclosed climate-controlled and spacious walkway*
- *Retail and service tenants selected for merchandise balance*
- *One or more anchor tenants*
- *A single management company*
- *Common car parks*
- *Central air-conditioning*
- *Central security service*
- *Central fire fighting services*
- *Common lifts and escalators*
- *Common lighting, signage and landscaping*

- Polisi pengurusan yang seragam
- Kegunaan sampingan seperti perbankan dan perkhidmatan lain, yang mana adalah kurang dari 25% daripada luas lantai bersih.

Arked perniagaan adalah kedai runcit dominan yang terletak di sebelah atau kedua-dua belah laluan kedai tersebut. Bagi pengumpulan dan penyebaran maklumat oleh NAPIC, kegunaan dominan bermaksud kegunaan perniagaan tidak kurang daripada 75% luas lantai bersih.

Arked perniagaan mempunyai:

- Kebiasaannya laluan pejalan kaki terbuka dan terdapat juga arked yang mempunyai ruang laluan pejalan kaki yang mempunyai kawalan suhu
- Penyewa runcit dan perkhidmatan kebiasaannya tidak terancang serta barangan yang dijual adalah serupa
- Tiada penyewa utama dalam arked
- Satu syarikat pengurusan
- Tempat letak kereta kegunaan bersama
- Kebiasaannya tiada sistem penyaman udara, tetapi terdapat juga arked yang mempunyai unit penyaman udara dan sistem penyaman udara
- Kebiasaannya tiada perkhidmatan keselamatan pusat
- Perkhidmatan kawalan kebakaran pusat
- Kebiasaannya tangga tetapi terdapat arked yang mempunyai lif dan eskalator kegunaan bersama
- Lampu, tunjuk arah dan landskap pada amnya adalah minimum
- Polisi pengurusan seragam yang minima
- Kegunaan sampingan seperti perkhidmatan insuran, yang mana adalah kurang dari 25% daripada luas lantai bersih.

Inventori arked beli-belah juga merangkumi:

- Ruang dengan kegunaan asal sebagai perniagaan tetapi telah ditukar kegunaannya buat sementara waktu.
- Ruang niaga dalam pembangunan bersepadu (di mana pelbagai kategori kegunaan saling membantu satu sama lain).

Tidak termasuk di dalam laporan ini adalah:

- Ruang niaga dalam bangunan pelbagai guna di mana kegunaannya boleh bertukar ganti dengan kegunaan pejabat, kediaman, hotel dan perindustrian.
- Ruang niaga yang mana telah ditukar dari kegunaan asalnya secara kekal.
- Ruang niaga dalam kompleks perniagaan yang digunakan untuk boling, medan selera, taman tema dan panggung wayang.

- *Unified management policies*
- *Complimentary secondary uses like banking and other services, which are less than 25% of the net floor area.*

Shopping arcades are dominant retail shops along one or both sides for trade. In data capturing and dissemination by NAPIC, dominant use means retail use not less than 75% of the net lettable area.

Shopping arcades have:

- *Generally open-sided walkway and few have an enclosed climate-controlled passageway.*
- *Retail and service tenants mix generally unplanned and retail goods are generally similar in kind*
- *No anchor tenants within the arcade*
- *A single management company*
- *Common car parks or public car parks*
- *Generally no air-conditioning, some unit air-conditioning and few with central air conditioning*
- *Central security service generally unavailable*
- *Central fire fighting services*
- *Mostly stairways but some have common lifts and escalators*
- *General minimum common lighting, signage and landscaping*
- *Minimum unified management policies*
- *Complimentary secondary uses like insurance services, which are less than 25% of the net floor area.*

Included within the shopping arcades inventory are:

- *Space with the original use as retail but has changed use on a temporary basis.*
- *Retail space in an integrated development (where various category of use compliment each other).*

Excluded from the inventory are:

- *Retail space within multipurpose buildings where use can interchange with office, residential, hotel and industrial use.*
- *Retail space that has permanently changed from the original use.*
- *Retail space within shopping complexes for bowling alley, food court, theme park and Cineplex.*

Pasar raya besar adalah pembangunan perniagaan yang mendapat faedah dari skala ekonomi akibat daripada saiz minimum yang besar dan menawarkan persaingan harga dan rangkaian barangan yang banyak. Pasar raya dalam data NAPIC termasuklah:

- Pembangunan perniagaan dengan keperluan modal minimum RM50 juta dan saiz minimum 5,000 m.p.
- Diuruskan oleh satu pemilik/perbadanan dengan kemudahan umum.
- Bangunan bebas di bawah satu bumbung.

Tidak termasuk di dalam laporan ini adalah:

- Pasar raya yang mana merupakan penyewa utama di kompleks perniagaan.

(iv) Harta Tanah Riadah

Definisi

Merangkumi hotel yang menyediakan penginapan jangka pendek yang mana tetamu hotel atau pengunjung perlu membayar untuk kemudahan yang disediakan. Bilik yang disediakan adalah lengkap untuk penginapan sementara dan khidmat pembantu hotel.

Termasuk di dalam laporan ini adalah:

- Hotel yang menawarkan 10 bilik dan ke atas yang dikenalpasti oleh Kementerian Pelancongan.
- Motel, rumah tumpangan, *chalet*, kabin, kotej, rumah kampung, *hotel resort*.
- Hotel binaan khas dan bangunan pelbagai guna atau bangunan yang diubahsuai yang mempunyai lesen untuk beroperasi sebagai hotel.

Tidak termasuk:

Hostel, pangsapuri khidmat dan rumah rehat kerajaan.

Pangsapuri Khidmat yang dimasukkan dalam Laporan Stok Harta Tanah Riadah merupakan sesebuah bangunan yang turut menyediakan penginapan jangka pendek yang mana tetamu hotel atau pengunjung perlu membayar kemudahan yang disediakan. Setiap unit menyediakan ruang yang lebih besar berbanding dengan bilik hotel dan mempunyai suasana seperti sebuah rumah yang dilengkapi dengan ruang tamu, ruang makan, dapur dan bilik tidur daripada satu hingga empat bilik beserta bilik air. Perkhidmatan yang disediakan sama seperti hotel. Unit-unit ini adalah sebagaimana yang terdapat di dalam stok kediaman kecuali ianya dimiliki oleh pengusaha hotel atau dijalankan oleh mereka sebagai alternatif kepada bilik hotel.

Termasuk di dalam laporan ini adalah pangsapuri khidmat yang dimiliki oleh syarikat yang mengurusnya dengan lesen pengusaha hotel.

Tidak termasuk di dalam laporan ini adalah pangsapuri khidmat yang dimiliki oleh individu tetapi diuruskan oleh pihak pengurusan yang mana unit-unit ini disewakan dalam tempoh mingguan, bulanan atau tahunan. Bagi mereka yang tidak mempunyai lesen hotel tidak termasuk dalam Laporan Stok Harta Tanah Riadah.

Hypermarkets are retail establishments that benefit from the economies of scale due to its large minimum size and offers competitive pricing and a wide range of goods. Hypermarkets in NAPIC publication include:

- *Retail establishments with a minimum paid-up capital requirement of RM50 million and minimum size of 5,000 s.m.*
- *Operated by a single owner/corporation with common facilities/amenities.*
- *A freestanding building under one roof.*

Excluded from publication:

- *Hypermarkets that are an anchor tenant in shopping centres.*

(iv) Leisure Property

Definition

Includes hotel with a number of rooms within a building that provides short-term accommodation for hotel guests or travellers who pay for the services provided. The rooms provided are furnished for a short stay and maid service.

Hotel inventory includes:

- *Hotels that offer 10 rooms and above as defined by the Ministry of Tourism*
- *Motels, lodging homes, chalets, cabins, cottages, kampung houses, resort hotels.*
- *Purpose-built hotels and multi-purpose buildings or modified buildings with a licence to operate as a hotel.*

Excludes:

Hostels, serviced apartments and public operated rest houses.

The Leisure Property Stock Report also includes serviced apartments, which are a number of units within a building that also provides a short-term accommodation for hotel guests and travellers who pay for the services provided. Each unit provides more space compared to a hotel room and has a home atmosphere like a living room, a dining room, a kitchenette and a choice of bedrooms from one to four rooms with attached bathrooms. Services provided are very similar to hotels. These units are similar to those under residential stock except that hoteliers own them or run them as an alternative to hotel rooms.

Included in the leisure property stock report are serviced apartments owned by companies who operate them with a hotel operator's licence.

Excluded from the leisure stock are serviced apartments owned by individuals but managed by corporations who rent out the units on a weekly, monthly or yearly period. They do not have an hotelier's licence and therefore excluded from the leisure property stock report.

Jenis Harta Tanah

Penyebaran NAPIC termasuk semua hotel yang berada di dalam sempadan negeri.

Pengelasan

Penerbitan adalah termasuk hotel yang diberi penarafan atau tidak. Pengelasan hotel ditentukan oleh Kementerian Pelancongan Malaysia berdasarkan standard antarabangsa. Hotel kelas ekonomi diberi penarafan okid (3 peringkat) dan selain itu adalah penarafan bintang (5 peringkat). Penarafan bintang bagi hotel-hotel di Malaysia dikendalikan oleh Kementerian Pelancongan.

Purata Kadar Penginapan

Adalah berdasarkan maklumat yang diterima daripada pengusaha hotel. Maklumat penginapan berdasarkan tempoh kajian yang dinyatakan di atas dan mungkin berbeza dengan suku tahunan kalendar.

7. Harta Tanah Industri**Definisi**

Unit bangunan/kilang yang terlibat dalam aktiviti pembuatan dan penyimpanan (gudang). Akta Penyelarasan Perindustrian 1975 (ICA) mendefinisikan "Aktiviti Pengilangan" sebagai membuat, mengubah, mengadun, menghiasi, memperkemas atau dengan cara lain merawat atau menyesuaikan apa-apa barang atau bahan dengan bermaksud penggunaan, penjualan, pengangkutan, penghantaran atau pembuangannya dan merangkumi pemasangan bahagian-bahagian dan pembaikan kapal tetapi tidak termasuk sebarang aktiviti yang biasanya berkaitan dengan perniagaan jual runcit atau borong. Unit perindustrian juga termasuk kemudahan penyimpanan tersendiri atau gudang yang tidak disebut di dalam definisi ICA. Walau bagaimanapun, laporan ini belum mengumpul data bagi kemudahan penyimpanan.

Jenis Harta Tanah

Data adalah berdasarkan lawat periksa dalam dan luar kawasan pihak berkuasa tempatan. Jenis harta tanah industri merangkumi unit teres, berkembar, sesebuah, kompleks perindustrian dan bertingkat.

Property Types

NAPIC dissemination includes all hotels within the state boundary.

Classification

Both rated and unrated hotels are included within the publication. Hotel rating classification is carried out by the Ministry of Tourism Malaysia based on international standards. Budget hotels are rated by orchid classification (3 levels) and the others are by star classification (5 levels). The rating of hotels in Malaysia is on going and carried out by the Ministry of Tourism.

Average Occupancy Rate

Is based on responses given by the hotel operators. Occupancy data is based on review periods as stated above and may differ from the calendar quarter.

7. Industrial Property**Definition**

Units that are buildings/factories that engage in manufacturing activity and storage (warehouses). The Industrial Co-ordination Act 1975 (ICA) defines industrial activity as the making, altering, blending, ornamenting, finishing or otherwise treating or adapting any article or substance with a view of its use, sale, transport, delivery or disposal; and includes the assembly of parts and ship repairing but shall not include any activity normally associated with retail or wholesale trade. Industrial units also include stand-alone storage facilities or warehouses that is not mentioned in the ICA definition. However this publication has not captured the data on storage facilities.

Property Types

The data is conducted by survey within and outside local authority area. Property types include terraced, semi-detached, detached, industrial complex and flatted units.

STATUS

1. **Tempoh kajian** laporan ini adalah meliputi tahun 2023 berakhir pada **31 Disember 2023**.
2. Liputan kajian ini hanya merangkumi unit kediaman, komersial dan industri.
3. **Pelancaran Jualan Harta Tanah** adalah aktiviti untuk memulakan pemasaran unit harta tanah dalam sesuatu projek secara rasmi oleh pemaju. Pelancaran boleh dilakukan selepas mendapat permit iklan dan jualan daripada Kementerian Perumahan dan Kerajaan Tempatan.

Sekiranya satu skim dilancarkan semula, tarikh baru pelancaran diambilkira. Pelancaran tidak rasmi (soft Launch) adalah peristiwa pemasaran bagi membekalkan maklumat mengenai projek sebelum kelulusan permit iklan dan jualan diperolehi. Tarikh tidak rasmi tidak diambilkira dalam pengumpulan data. Oleh itu, Tarikh pelancaran rasmi akan diambilkira sebagai Tarikh pelancaran.

4. **Pelancaran baharu** mengandungi harta tanah dalam skim perumahan yang telah dilancarkan pada tahun 2023.

Prestasi jualan merujuk kepada peratusan bilangan unit yang telah dijual atas jumlah unit yang dilancarkan bagi sesuatu jenis harta tanah dalam tempoh kajian. Dua jenis prestasi jualan telah dikira di dalam laporan ini iaitu prestasi jualan suku tahunan dan prestasi jualan terkumpul.

5. Mulai 1 Januari 2003, "harta tanah siap dibina tidak terjual" telah didefinisikan sebagai unit kediaman, komersial dan industri yang telah siap dibina dan telah mendapat Sijil Penyiapan dan Pematuhan/ Sijil Layak Menduduki Sementara tetapi kekal tidak terjual melebihi tempoh sembilan bulan selepas ianya dilancarkan untuk jualan pada atau selepas 1 Januari 1997.
6. **Harta tanah siap dibina tidak terjual** merangkumi unit kediaman, komersial dan industri yang telah siap dibina dan mendapat Sijil Penyiapan dan Pematuhan/ Sijil Layak Menduduki/ Sijil Layak Menduduki Sementara dalam tempoh kajian. Unit ini masih tidak terjual melebihi tempoh sembilan bulan dari tarikh pelancaran atau selepas 1 Januari 1997.
7. **Nilai** harta tanah yang tidak terjual diperolehi daripada harga jualan purata oleh pemaju mengikut jenis harta tanah yang ditawarkan untuk jualan dikalikan dengan bilangan harta tanah yang tidak terjual pada penghujung tempoh kajian.

STATUS

1. **The review period** of this report covers of the year 2023 ending on **31st December 2023**.
2. The coverage of the survey was confined to residential, commercial and industrial units.
3. **Launch of Property Sales** is an activity to start marketing formally the property units of a project by the developer. The launch can be done after obtaining the advertisement and sales permit from the Ministry of Housing and Local Government.

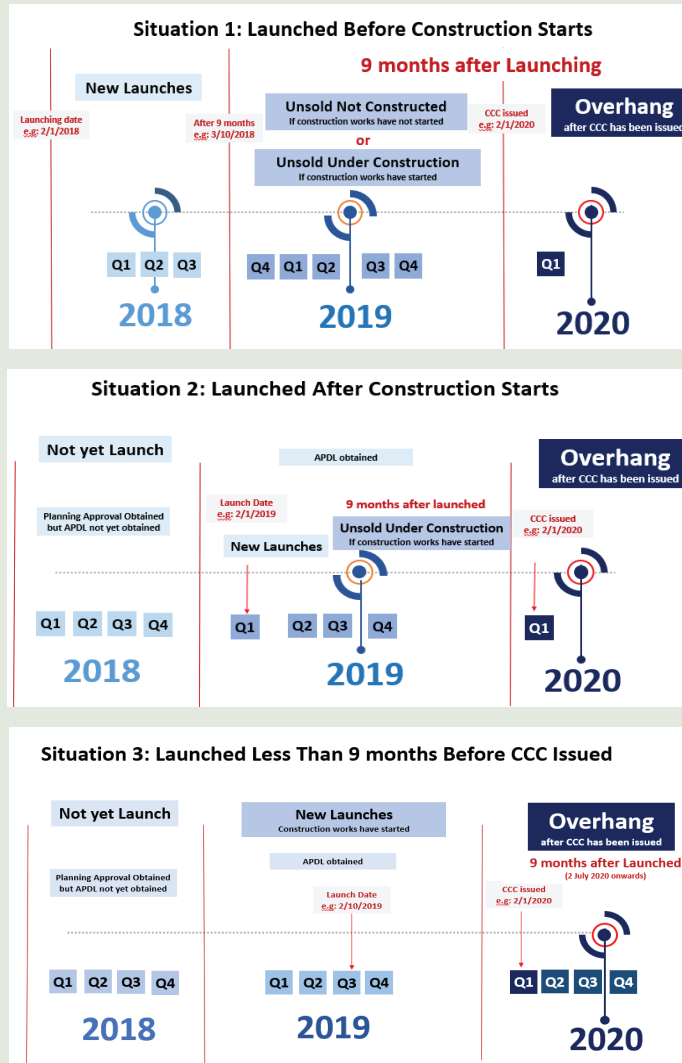
If a scheme was re-launched, the new launch date is considered. The unofficial launch (soft Launch) is a marketing event to provide information about the project before the approval of advertisement and sales permit is obtained. The unofficial date is not considered in data collection. Therefore, the official launch date will be the date recorded.

4. **New launches** comprise properties in residential schemes launched in year 2023.

Sales performance refers to the percentage of number of units sold from the total units launched for a specific type of property in the review period. Two types of sales performance are computed in this publication namely quarterly sales performance and accumulated sales performance.

5. Starting January 1, 2003 "property overhang" has been defined as residential, commercial and industrial units that have been completed and issued with a Certificate of Completion and Compliance / Temporary Certificate of Fitness for Occupation but remained unsold for more than nine months after it was launched for sales on or after 1st January 1997.
6. **Property overhang** comprises residential units, commercial units and industrial units that are completed with Certificate of Completion and Compliance/ Temporary Certificate of Fitness for Occupation in the review period. These units remained unsold for more than nine months from the date of launching or after 1st January 1997.
7. **The value** of overhang properties is derived from the average selling price for the particular type of property offered for sale by the developer multiplied by the number of overhang property at the end of the review period.

UNDERSTANDING THE PROPERTY OVERHANG



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8. **Harta tanah dalam pembinaan belum terjual** merangkumi unit kediaman, komersial dan industri yang sedang dalam pembinaan dan memperolehi kelulusan pelan bangunan. Unit ini tidak terjual melebihi tempoh sembilan bulan daripada tarikh dilancarkan untuk jualan atau selepas 1 Januari 1997.
9. **Harta tanah belum dibina belum terjual** merangkumi unit kediaman, komersial dan industri yang belum dibina dan belum memperolehi kelulusan pelan bangunan. Unit ini tidak terjual melebihi tempoh sembilan bulan daripada tarikh dilancarkan untuk jualan atau selepas 1 Januari 1997.
10. **Sebuah skim perumahan** adalah projek perumahan yang mengandungi sekurang-kurangnya lima atau lebih bangunan yang digunakan untuk tujuan kediaman. Satu skim perumahan adalah satu identiti. Ianya boleh dibangunkan di atas sekeping tanah dengan satu hakmilik, atau banyak tanah dengan hakmilik yang lebih dari satu, serta boleh dibangunkan dalam beberapa fasa. Pembangunan tersebut boleh bercampur dengan bangunan untuk kegunaan lain seperti perniagaan, industri dan institusi.
8. **Unsold Under Construction property** comprises residential units, commercial units and industrial units with building plan approval that are under constructed. These Units remained unsold for more than nine months from the date of launch or after 1st January 1997.
9. **Unsold not constructed property** comprises residential units, commercial units and industrial units with building plan approval that are not yet constructed. These units remained unsold for more than nine months from the date of launch or after 1st January 1997.
10. **A residential scheme** is a housing project comprised a minimum of five or more buildings mainly used for dwelling purposes. A residential scheme has one identity. It may be developed on a land with a single title or on lands with multiple titles and could be developed in phases. The developments can be mixed with buildings for other uses like retail, industrial or institutional.

**SENARAI CAWANGAN
JABATAN PENILAIAN DAN PERKHIDMATAN HARTA**

Ketua Pengarah Penilaian
Jabatan Penilaian dan Perkhidmatan Harta,
Kementerian Kewangan Malaysia,
Aras 9, Perbendaharaan 2,
No. 7, Persiaran Perdana, Presint 2,
62592 Putrajaya
Tel. : 603 - 8886 9000
Faks : 603 - 8886 9001

Pengarah
Pusat Maklumat Harta Tanah Negara (NAPIC)
Kementerian Kewangan Malaysia,
Aras 7, Perbendaharaan 2,
No. 7, Persiaran Perdana, Presint 2,
Pusat Pentadbiran Kerajaan Persekutuan
62592 Putrajaya
Tel. : 603 - 8886 9000
Faks : 603 - 8886 9007

Pengarah Penilaian Negeri
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 2, One Central,
Jalan Travers, Kuala Lumpur Sentral
50470 Kuala Lumpur
Tel. : 603 - 2272 1797
Faks : 603 - 2272 1795

Penilai Daerah Kuala Lumpur
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 1, One Central,
Jalan Travers, Kuala Lumpur Sentral
50470 Kuala Lumpur
Tel. : 603 - 2272 1797
Faks : 603 - 2272 1795

Penilai Daerah Labuan
Jabatan Penilaian dan Perkhidmatan Harta,
No.4(A2), Tingkat 4, Blok 4 Kompleks Ujana Kewangan,
Jalan Merdeka,
87007 Wilayah Persekutuan Labuan
Tel. : 087 - 416445
Faks : 087 - 410337

Pengarah Penilaian Negeri
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 8, Plaza Perangsang,
Persiaran Perbandaran
40000 Shah Alam, Selangor
Tel. : 603 - 5518 4603/ 603- 5519 7825
Faks : 603 - 5510 7397

Penilai Daerah Shah Alam
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 3 & 4, Plaza Perangsang,
Persiaran Perbandaran
40000 Shah Alam, Selangor
Tel. : 603 - 5519 4823
Faks : 603 - 5510 8622

Penilai Daerah Segamat
Jabatan Penilaian dan Perkhidmatan Harta,
No. 49 & 49-1, Tingkat Bawah & 1, Jalan Genuang,
85000 Segamat, Johor
Tel. : 607 - 932 3300
Faks : 607 - 932 4322

Penilai Daerah Bangi
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 1 & 3, Komplek PKNS,
Persiaran Bangi,
43650 Bandar Baru Bangi, Selangor
Tel. : 603 - 8925 5467
Faks : 603 - 8925 1041

Penilai Daerah Gombak
Jabatan Penilaian dan Perkhidmatan Harta,
17A-C & 16B, Lorong Batu Caves 2,
Wisma Keringat 2,
68100 Batu Caves, Selangor
Tel. : 603 - 6186 1719
Faks : 603 - 6186 1832

Penilai Daerah Klang
Jabatan Penilaian dan Perkhidmatan Harta
Tingkat 7, First Tower
Jalan Meru
41050 Klang, Selangor
Tel. : 603 - 3344 1270
Faks : 603 - 3344 1275

Penilai Daerah Sepang
d/a Jabatan Penilaian dan Perkhidmatan Harta
Institut Penilaian Negara (INSPEN)
Jabatan Penilaian dan Perkhidmatan Harta
Persiaran INSPEN
43000 Kajang, Selangor
Tel. : 603 - 8920 1736
Faks : 603 - 8920 1755

Pengarah Penilaian Johor
Jabatan Penilaian dan Perkhidmatan Harta,
Bangunan Jaro,
No. 18, Jalan Sungai Chat,
80100 Johor Bahru, Johor
Tel. : 607 - 218 8800
Faks : 607 - 223 4266

Penilai Daerah Johor Bahru
Jabatan Penilaian dan Perkhidmatan Harta,
Bangunan Jaro,
No. 18, Jalan Sungai Chat,
80100 Johor Bahru, Johor
Tel. : 607 - 218 8800
Faks : 607 - 226 9711

Penilai Daerah Batu Pahat
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 2, Bangunan Gunasama Persekutuan,
Jalan Bakau Condong,
83000 Batu Pahat, Johor
Tel. : 607 - 434 3645
Faks : 607 - 431 7026

Penilai Daerah Kluang
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 3, Bangunan Gunasama Persekutuan,
Jalan Batu Pahat,
86000 Kluang, Johor
Tel. : 607 - 772 3566
Faks : 607 - 774 3810

**SENARAI CAWANGAN
JABATAN PENILAIAN DAN PERKHIDMATAN HARTA**

Penilai Daerah Muar
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 4 & 5,
Bangunan Muar Trade Centre,
Jalan Petrie,
84000 Muar, Johor
Tel. : 606 - 954 2244
Faks : 606 - 954 4499

Pengarah Penilaian Negeri
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 41, Bangunan KOMTAR,
10593 Pulau Pinang
Tel. : 604 - 261 2607
Faks : 604 - 261 5990

Penilai Daerah George Town
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 41, Bangunan KOMTAR,
10593 Pulau Pinang
Tel. : 604 - 261 2607
Faks : 604 - 261 5990

Penilai Daerah Seberang Perai
Jabatan Penilaian dan Perkhidmatan Harta,
3-10, Kompleks Sempilai, Jalan Sempilai,
13700 Seberang Perai, Pulau Pinang
Tel. : 604 - 398 8544
Faks : 604 - 398 8533

Pengarah Penilaian Negeri
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 9, Bangunan Yayasan Negeri,
Jalan Yam Tuan,
70000 Seremban, Negeri Sembilan
Tel. : 606 - 763 8602
Faks : 606 - 763 9306

Penilai Daerah Seremban
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 8, Bangunan Yayasan Negeri,
Jalan Yam Tuan,
70000 Seremban, Negeri Sembilan
Tel. : 606 - 763 8602
Faks : 606 - 763 9306

Penilai Daerah Jempol
Jabatan Penilaian dan Perkhidmatan Harta,
NO. 18, 20 & 22, Jalan Ara 6,
Pusat Pemiagaan Ara, Bandar IOI Bahau,
72100 Bahau, Negeri Sembilan
Tel. : 606 - 454 6591
Faks : 606 - 454 6597/ 606 - 454 6599

Penilai Daerah Alor Setar
Jabatan Penilaian dan Perkhidmatan Harta,
Aras 2, Zon C, Wisma Persekutuan
Bandar Muadzam Shah, Anak Bukit
06550 Alor Setar, Kedah
Tel. : 604 - 700 1900
Faks : 604 - 700 1905

Pengarah Penilaian Negeri
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 8, Bangunan Sri Kinta,
Jalan Sultan Idris Shah,
30593 Ipoh, Perak
Tel. : 605 - 241 4577
Faks : 605 - 241 4658

Penilai Daerah Ipoh
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 6, Bangunan Sri Kinta,
Jalan Sultan Idris Shah,
30593 Ipoh, Perak
Tel. : 605 - 241 4577
Faks : 605 - 252 4658

Penilai Daerah Taiping
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 7, Wisma Persekutuan, Jalan Istana Larut
34000 Taiping, Perak
Tel. : 605 - 807 2344
Faks : 605 - 807 2464

Penilai Daerah Teluk Intan
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 1 & 2, Kompleks SKOMK, Jalan Mahkamah,
36000 Teluk Intan, Perak
Tel. : 605 - 622 3711
Faks : 605 - 622 7122

Pengarah Penilaian Negeri
Jabatan Penilaian dan Perkhidmatan Harta,
Aras 7, Wisma Persekutuan,
Jalan MITC, Hang Tuah Jaya,
75450 Melaka
Tel. : 606 - 232 8102
Faks : 606 - 232 8202

Penilai Daerah Melaka
Jabatan Penilaian dan Perkhidmatan Harta,
Aras 7, Wisma Persekutuan,
Jalan MITC, Hang Tuah Jaya,
75450 Melaka
Tel. : 606 - 232 8102
Faks : 606 - 232 8103

Pengarah Penilaian Negeri
Jabatan Penilaian dan Perkhidmatan Harta,
Aras 2, Zon C, Wisma Persekutuan
Bandar Muadzam Shah, Anak Bukit
06550 Alor Setar, Kedah
Tel. : 604 - 700 1900
Faks : 604 - 700 1904

Penilai Daerah Sungai Petani
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 3, Wisma Ria, Taman Ria
08000 Sungai Petani, Kedah
Tel. : 604 - 421 3024
Faks : 604 - 422 0264

**SENARAI CAWANGAN
JABATAN PENILAIAN DAN PERKHIDMATAN HARTA**

Penilai Daerah Langkawi
Jabatan Penilaian dan Perkhidmatan Harta,
No. 102 & 103, Jalan Pandak Mayah 5,
Pusat Bandar Kuah,
07000 Langkawi, Kedah
Tel. : 604 - 966 0478
Faks : 604 - 966 8832

Penilai Daerah Kulim
Jabatan Penilaian dan Perkhidmatan Harta,
69-70, Jalan Kelang Lama,
Taman Manggis,
09000 Kulim, Kedah
Tel. : 04 - 491 7429
Faks : 04 - 490 7362

Pengarah Penilaian Negeri
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 2, Bangunan KWSP,
Bandar Indera Mahkota
25200 Kuantan, Pahang
Tel. : 609 - 571 5111
Faks : 609 - 571 5112

Penilai Daerah Kuantan
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat Bawah, Bangunan KWSP,
Bandar Indera Mahkota
25200 Kuantan, Pahang
Tel. : 609 - 571 5000
Faks : 609 - 571 5001

Penilai Daerah Temerloh
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 3, Bangunan Gunasama Persekutuan,
Jalan Merdeka,
28000 Temerloh, Pahang
Tel. : 609 - 296 1844
Faks : 609 - 296 3790

Penilai Daerah Raub
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 3, Bangunan Gunasama Persekutuan,
Jalan Tengku Abdul Samad,
27600 Raub, Pahang
Tel. : 609 - 355 1744
Faks : 609 - 355 7743

Pengarah Penilaian Negeri
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 9, Wisma Persekutuan,
Jalan Sultan Ismail,
20200 Kuala Terengganu, Terengganu
Tel. : 609 - 620 4550
Faks : 609 - 620 4551

Penilai Daerah Kuala Terengganu
Jabatan Penilaian dan Perkhidmatan Harta,
No. 1118 F & 1118 G, Jalan Pejabat,
20200 Kuala Terengganu, Terengganu
Tel. : 609 - 626 4266
Faks : 609 - 622 1240

Penilai Daerah Chukai
Jabatan Penilaian dan Perkhidmatan Harta,
Aras 2, Bangunan Persekutuan,
24000 Chukai, Terengganu
Tel. : 609 - 859 2166
Faks : 609 - 859 8296

Penilai Daerah Jerteh
Jabatan Penilaian dan Perkhidmatan Harta,
Lot 60086, Jalan Pasar Baru,
22000 Jerteh, Terengganu
Tel. : 609 - 690 3436 / 09 - 690 3293 /
09 - 690 4030
Faks : 609 - 690 3920

Pengarah Penilaian Negeri
Jabatan Penilaian dan Perkhidmatan Harta,
Aras 4, Wisma Persekutuan,
Jalan Bayam,
15592 Kota Bharu, Kelantan
Tel. : 609 - 748 1600
Faks : 609 - 744 1500

Penilai Daerah Kota Bharu
Jabatan Penilaian dan Perkhidmatan Harta,
Aras 4, Wisma Persekutuan,
Jalan Bayam,
15592 Kota Bharu, Kelantan
Tel. : 609 - 748 1600
Faks : 609 - 744 1500

Penilai Daerah Kuala Krai
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 1, Bangunan Kerajaan Persekutuan,
18000 Kuala Krai, Kelantan
Tel. : 609 - 966 6757
Faks : 609 - 966 4728

Pengarah Penilaian Negeri
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 2, Bangunan Persekutuan,
Persiaran Jubli Emas,
01000 Kangar, Perlis
Tel. : 604 - 976 2978
Faks : 604 - 976 1010

Pengarah Penilaian Negeri
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 4, Blok B, Kompleks KUWASA,
Jalan Karamunsing, Beg Berkunci 2043
88999 Kota Kinabalu, Sabah
Tel. : 088 - 248 325
Faks : 088 - 242 328

Penilai Daerah Kota Kinabalu
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 5, Blok B, Kompleks KUWASA,
Jalan Karamunsing, Beg Berkunci 2043
88999 Kota Kinabalu, Sabah
Tel. : 088 - 243 433
Faks : 088 - 233 435

**SENARAI CAWANGAN
JABATAN PENILAIAN DAN PERKHIDMATAN HARTA**

Penilai Daerah Tawau
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 1, Wisma Persekutuan,
91000 Tawau, Sabah
Tel. : 089 - 779 823
Faks : 089 - 770 166

Penilai Daerah Sandakan
Jabatan Penilaian dan Perkhidmatan Harta,
Lot 1 & 2, Tingkat Bawah, Wisma Saban,
Megah Light Industrial Estate,
Batu 7, Jalan Labuk,
90000 Sandakan, Sabah
Tel. : 089 - 675 302
Faks : 089 - 675 312

Pengarah Penilaian Negeri
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 3, Wisma Hong,
No. 202, Batu 2 3/4, Jalan Rock,
93200 Kuching, Sarawak
Tel. : 082 - 255 859
Faks : 082 - 243 4575

Penilai Daerah Kuching
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 2, Wisma Hong,
No. 202, Batu 2 3/4, Jalan Rock,
93200 Kuching, Sarawak
Tel. : 082 - 255 859
Faks : 082 - 426 226

Penilai Daerah Miri
Jabatan Penilaian dan Perkhidmatan Harta,
Tingkat 10, Yu Lan Plaza,
Jalan Brooke,
98000 Miri, Sarawak
Tel. : 085 - 417 226
Faks : 085 - 415 226

Penilai Daerah Sibul
Jabatan Penilaian dan Perkhidmatan Harta,
Lot 4160 Blok 7 Sibul Town District
No. 60, Jalan Tiong Hua
96000 Sibul, Sarawak
Tel. : 084 - 327 407
Faks : 084 - 327 064

Pengarah
Institut Penilaian Negara (INSPEN)
Jabatan Penilaian dan Perkhidmatan Harta
Persiaran INSPEN
43000 Kajang, Selangor
Tel. : 603 - 8911 8800
Faks : 603 - 8925 8100

Untuk sebarang maklumat lanjut berkaitan NAPIC dan penerbitannya:

silalahubungi :

Pengarah,
Pusat Maklumat Harta Tanah Negara (NAPIC)
Jabatan Penilaian dan Perkhidmatan Harta
Aras 7, Perbendaharaan 2,
No. 7, Persiaran Perdana, Presint 2
62592 Putrajaya

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emel : napic@jp-ph.gov.my

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